

# BUILDING HIS KINGDOM

CATHOLIC FOUNDATION OF NORTHEAST KANSAS | PLANNED GIVING INITIATIVE

# *Building His Kingdom One Catholic Legacy Gift at a Time*

Launched in 2009 under the direction of Archbishop Joseph F. Naumann, the Planned Giving Initiative (PGI) helps parishes, schools and Catholic organizations build planned giving into their culture. Parishes have five years to put into place best practices that move them from Bronze to Diamond Planned Giving Status. By following CFNEK PGI guidelines parishes see measurable improvement in confirmed planned gifts.

**“The Catholic Foundation’s materials are terrific – logical, easy to read, spelling out steps to follow. My committee was energized. The burden of determining how to begin was gone. It’s “easy” to make the visits. By “just” informing and making simple asks of people to consider a gift after death, we’ve already been notified of 13 gifts in just the first year.”**

*-Mary Losik, Good Shepherd*

## *Bronze Planned Giving Status*

### • Implement “A Timeless Faith” first year five steps.

1. Create an endowment or fund with CFNEK (\$5,000 minimum).
2. Appoint endowment trustees with two to seven parishioners and your pastor.
3. Track current and expected planned gifts.
4. Launch a Catholic Legacy Society (CLS) in your parish or school.
5. Coordinate ongoing planned giving promotion and appreciation efforts with CFNEK.

## *Silver Planned Giving Status*

### – *Bronze Planned Giving Status Criteria Plus:*

- **1% of annual loyal parish and/or school donors are CLS members**
- **Active and consistent message of estate planning that includes charitable bequests to the church**

1. Update Endowment Trustees, and add new trustees as necessary
2. Report on endowment and bequest activity to parish quarterly. Also report significant deposits to or distributions from the endowment.
3. Evaluate parishioners’ giving history to identify households that have shown a commitment to the parish with consistent giving, not necessarily large gifts.
4. Add planned giving information to all new parishioner welcome packets.
5. Continue to give recognition and ongoing communication to Catholic Legacy Society members from year one. An intimate social event may be appropriate.
6. Publish testimonials from CLS members on why they chose to make a planned gift.
7. Develop a plan to personally contact prospective parishioners with a letter from the pastor and follow-up phone call from trustees. (Top 20 percent of loyal annual givers)
8. Collect CLS surveys and use feedback to improve Planned Giving Initiative marketing.

## *Gold Planned Giving Status*

### – *Silver Planned Giving Status Criteria Plus:*

- **2% of annual loyal parish and/or school donors are CLS members**
- **Active and consistent message of estate planning that includes charitable bequests to the church**

1. Continue targeted legacy gift solicitation through letters and follow-up phone calls. Add new parishioners who have been consistent givers for more than six months.
2. Send annual letter to all CLS members and prospects with a list of life events that may result in a need to revise wills and estates.
3. Send informational targeted gift annuity mailing. Consult CFNEK for help identifying potential gift annuitants.

### *Platinum Planned Giving Status*

#### *– Gold Planned Giving Status Criteria Plus:*

- 3% of annual loyal parish and/or school donors are CLS members
- Active and consistent message of estate planning that includes charitable bequests to the church

### *Diamond Planned Giving Status*

#### *– Gold Planned Giving Status Criteria Plus:*

- 4% of annual loyal parish and/or school donors are CLS members
- Active and consistent message of estate planning that includes charitable bequests to the church

1. Conduct a comprehensive final survey of your CLS. Use input to improve PGI communication.

### *Bronze Planned Giving Status*

Parish or School Name	City	Parish Families	CLS Members	Endowment Established
Bishop Miege High School	Shawnee	N/A	17	1998
Church of the Nativity	Leawood	2067	9	2005
Curé of Ars	Leawood	2053	11	1993
Holy Cross	Overland Park	1340	6	1996
Holy Family	Eudora	290	3	2011
Holy Trinity	Lenexa	2785	11	2001
Most Pure Heart of Mary	Topeka	1459	10	1990
Sacred Heart	Emporia	816	8	1989
Sacred Heart	Shawnee	1601	3	2007
St. Benedict	Atchison	509	5	2009
St. Gregory the Great	Marysville	459	3	1996
St. Joseph	Waverly	38	1	2010
St. Matthew	Topeka	1076	2	1991

### *Silver Planned Giving Status*

Parish or School Name	City	Parish Families	CLS Members	Endowment Established
Bishop Ward High School	Kansas City	N/A	29	1989
Donnelly College	Kansas City	N/A	7	2007
Good Shepherd	Shawnee	1678	13	2005
Holy Spirit	Overland Park	1423	7	2003
Immaculate Conception	St. Marys	346	13	2007
Immaculate Conception-St. Joseph	Leavenworth	1010	16	2009
Mother Teresa of Calcutta	Topeka	811	14	2009
St. Ann	Prairie Village	1490	15	1993
St. Michael the Archangel	Leawood	1983	20	2009

*The Archdiocese of  
Kansas City in Kansas has*

**61,000**  
*registered households in*

**108** *parishes across*  
**21** *counties.*

**265**  
*total Catholic Legacy  
Society members*

**\$2,211,898**  
*New Deposits to  
Endowments and Funds at  
CFNEK.*

*More than*  
**\$1,300,000**  
*distributed from  
Endowments and Funds for  
the 3rd straight year.*

**70** *new Catholic Legacy  
Society members.*

**8** *new Endowments or Funds.*

**6** *new Silver Planned Giving  
Status parishes & schools.*

**4** *new Bronze Planned Giving  
Status parishes.*

**1** *new Bronze Planned Giving  
Status Catholic High School.*

*PGI accomplishments in fiscal year  
2011-2012 ending June 30, 2012.*



---

## Simple steps to implement “A Timeless Faith”

---

The CFNEK offers a full range of support and resources to help you take an active role in a successful planned giving initiative. Here are the basic steps involved:

- 1 Create an endowment or fund with CFNEK (\$5,000 minimum).
- 2 Form a committee with 2 to 7 parishioners, and your pastor.
- 3 Track current and expected planned gifts.
- 4 Help launch a Catholic Legacy Society in your parish and provide member list to CFNEK.
- 5 Coordinate ongoing planned giving promotion and appreciation efforts with CFNEK.

---

## Rewards of Catholic bequests and planned giving

---

The decision to become part of the Catholic Legacy Society brings with it a number of rewarding benefits, including the ability to:

- Memorialize loved ones
- Teach gratitude to future generations
- Create a gratifying and lasting legacy
- Promote greater financial stability within the Church
- Build the Kingdom of God by sustaining Catholic Community

---

## Easy ways to join the Catholic Legacy Society

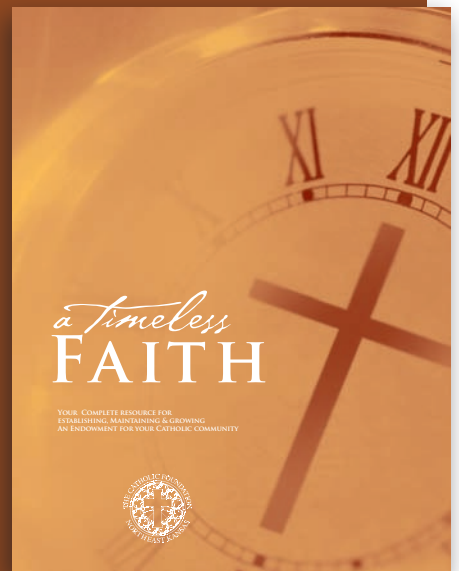
---

- Beneficiary change to your IRA or life insurance policy
- Fill out a “Pay on Death” for a bank account or “Transfer on Death” for real estate
- Percentage in your will to a parish, Catholic School or ministry
- Designate a CFNEK endowment in your will
- Establish a Gift Annuity with your parish as the beneficiary
- Establish a Donor Advised Fund with your parish as the beneficiary



The Catholic Foundation of Northeast Kansas

12615 Parallel Parkway | Kansas City, Kansas 66109 | 913.647.0325 | [www.cfnek.org](http://www.cfnek.org)



---

## Visit [cfnek.org](http://cfnek.org)

---

Partnering with the Catholic Foundation of Northeast Kansas and implementing “A Timeless Faith” will help foster a culture of Catholic philanthropy in your parish, school or ministry. Visit us at [cfnek.org](http://cfnek.org) or call (913) 647-0325 for the guidance you need to get started today.

---

## Planned Giving Initiative - Ultimate Goal

---

The ultimate goal of the Planned Giving Initiative is to foster a culture of planned giving across the Archdiocese of Kansas City in Kansas where all practicing Catholics have updated wills that include charitable gifts.