



STARTING A LEGACY INITIATIVE

VISION

Why Legacy? Many Donors would like to make a lasting impact as part of THEIR personal Legacy. They may consider your organization in THEIR Legacy Giving Plans. This is a Blessing to your Donors.

Legacy matters for most organizations. If your organization's Vision is to serve long term, into the next generation, a Legacy perspective will help fuel gifts with the next generation in mind.

Leadership support is vital. Share the impact legacy Giving will have your organization's Mission. Ask your Board/Elders to engage in discussion, to pray and support your Legacy efforts.

PLANNING

Establish a Legacy Society

This is a way to honor those who make legacy gifts and commitments with a lasting place of honor. Consider what name you will use, what gifts will include in the society and what you will do for the Society members.

Raise awareness about Legacy giving

Plan an ongoing communications campaign about giving options for inheritance, giving from accumulated assets, appreciated property, etc. that will have LASTING impact on the mission and the Kingdom. Donors are interested in investing Legacy gifts when the organization has a clear Legacy Vision.

Prepare your website

Make sure you include legacy giving as an option on your website. Explain what it is, what it will mean to the organization and Kingdom, and what the next step is to find out more.

PROCESS. HOW CHRISTIAN FOUNDATION OF AMERICA CAN HELP

- As part of core mission, CFA will provide a one-hour session with your leadership, locally or video call.
- We offer many seminars related to Legacy giving. Education is essential to introduce your potential donors to ideas that may work for them. Learn what is possible! For funds management clients, we include up to 2 seminars locally or by webinar/year at no charge. For others, contact us for cost. We have facilitated webinars available at low cost and can provide live seminars as well.

"Encouraging Generosity for Inspired Legacy Impact"

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- CFA provides expertise for major gifts, gifts of appreciated assets such as securities or real estate, and will help donors implement these gifts, including using personal giving funds, pass through gifts, or charitable trusts. Think of CFA as your organization's Legacy and Planned giving service arm.
- CFA provides consulting assistance to help you create a Legacy program, provide marketing content, calendars, and support so your staff can confidently carry out activities. We also provide analysis to help you identify and reach out to potential Legacy donors. We will work within your budget.
- CFA offers a "Gift Charity" Web Page and newsletter. This gets branded with your organization and is a content rich subscription that supports Legacy Giving. Cost to Crescendo for this is \$250 per year. CFA can assist you staff if desired.

EXAMPLE SEMINAR ACTIVITY

- Plan a gathering of potential Legacy Givers for a Legacy Planning Seminar. At this seminar you will want to share your mission and vision followed by CFA explaining what Legacy Giving means and how it can be accomplished. We use actual donor stories that are inspiring and have practical application.
 - Do you want to combine it with a tour of your facility or a donor appreciation lunch?
 - Time and location
 - Guest list
 - Marketing

EXAMPLE TIMELINE TO START LEGACY INITIATIVE

Sample timeline for a September Legacy Seminar:

June: Meet with your board

July: Meet/talk with CFA to set-up a date and time for the seminar and go over any details. Location secured. Decision on who to invite. Start marketing with a save the date and general information about Legacy Giving.

August: Market through all avenues including personally inviting board members and donors to the Seminar. Make sure your website is updated. CFA can make available a giving website called Gift Charity at very modest annual cost (\$250/yr). It includes constantly refreshed content and an e-newsletter.

September: Continue to market and personally invite right up until the Seminar.

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