

Building donor relationships



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**FORMS**

Legacy Society Reply Card Template

PGB3-1303

WEEKS 13-14

Your Legacy Society Brochure and Reply Card

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| --- | --- |
| **BACKGROUND** | The Effective Brochure and Reply Card |
| **PROJECTS** | Create Your Legacy Society Brochure |
|  | Create Your Legacy Society Reply Card |
| **DOCUMENTS** | PGB3-1301 – Brochure Sample (Remington Society) |
|  | PGB3-1302 – Legacy Society Brochure Template |
|  | PGB3-1303 – Legacy Society Reply Card Template |

**Time required:** 2 hours

**What it covers:** Developing a legacy society brochure to encourage membership

**Why:** The benefits of society membership will be attractive to a certain group of potential legacy donors

**How to get it:** [www.PlannedGivinginaBox.Com/PGB3-1301](http://www.plannedgivinginabox.com/PGB3-1301)

[www.PlannedGivinginaBox.Com/PGB3-1302](http://www.plannedgivinginabox.com/PGB3-1302)

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BACKGROUND

*Brochure and Reply Card*

The legacy society brochure, which tells the story of the society and criteria for membership, should be a mainstay of your planned giving stewardship efforts.

Download the University of the Sciences Remington Society sample brochure at [www.PlannedGivinginaBox.Com/PGB3-1301](http://www.plannedgivinginabox.com/PGB3-1301). It provides an excellent example of a legacy society brochure done right.

Notice how the brochure invites the reader to join the Society. It then uses four panels to:

1. Tell the story of Joseph Remington and why his legacy is so important;
2. Why planned gifts, and the prospect’s planned gift, would be so important to the University;
3. What constitutes a planned gift that qualifies for membership; and
4. A call to action.

The text of the brochure is pithy and to the point, using quotes for a “peer-to-peer ask” (that is, when one person asks a peer – fellow alum, administrator, etc. – to make a gift). These quotes tie into the general planned giving brochure, which highlights **the same group** of planned giving donors. Note that the call to action provides *multiple ways* to contact a real person about a planned gift, including a confidential reply card.

PROJECTS

**Project 11: Create Your Legacy Society Brochure**  
Download the legacy society brochure template at [www.PlannedGivinginaBox.Com/PGB3-1302](http://www.plannedgivinginabox.com/PGB3-1302). Revise the template:

* To highlight your **mission,**
* To tell the society **story,**
* To explain **why planned gifts are important**, and
* To define **what constitutes a planned gift** that qualifies for membership.

Be *sure* to include a **call to action**.

**Project 12: Create Your Legacy Society Reply Card**

Download the legacy society reply card template at [www.PlannedGivinginaBox.Com/PGB3-1303](http://www.plannedgivinginabox.com/PGB3-1303). Customize it to your program and your society.

Note that this reply card is far *less detailed* than what you might expect for other print materials. This is because the focus of the brochure you just created is **to invite individuals to join your legacy society**. It only asks for *what you need in order to take the next step* with the prospect.

* If you provide too many options, your prospect can be overwhelmed and not respond at all.

DOCUMENT PGB3-1302

Legacy Society Reply Card Template

**Yes! I’m interested in learning more about [NAME OF SOCIETY]**

Name:

Street Address:

City:

State, Zip Code:

Phone Number:

E-mail Address:

Date of Birth:

🞏I have included **[YOUR CHARITY]** in my long-term plans. Please send me a **[NAME OF LEGACY SOCIETY]** welcome packet.

🞏I am considering adding **[YOUR CHARITY]** to my plans. Please contact me.

For additional information on **[NAME OF SOCIETY]**, please contact **[INSERT CONTACT INFORMATION HERE INCLUDING NAME, ADDRESS, PHONE, EMAIL AND WEBSITE URL]**.