

Building donor relationships



**FORMS**

Legacy Society Brochure Template

PGB3-1302

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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)

[www.PlannedGivinginaBox.Com/PGB3-1303](http://www.plannedgivinginabox.com/PGB3-1303)

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 Brochure Template

**[COVER]**

**[NAME OF LEGACY SOCIETY]**

**[LOGO OF LEGACY SOCIETY]**

**[PAGE ONE]**

**[LETTER FROM THE PRESIDENT OR BOARD CHAIR]**

“A man has made at least a start on discovering the meaning of human life when he **plants shade trees** under which he knows full well he will never sit.”~ Elton Trueblood

As I address these words to you, I feel I am talking to a friend and partner – one whose sense of stewardship for the future has led you to consider a legacy gift to **[YOUR CHARITY]**.

I hope to soon be able to welcome you to the **[NAME OF LEGACY SOCIETY]**, whose members are esteemed at **[YOUR CHARITY]** not only for their powerful generosity but also for their vision and commitment. It is a special person indeed who is motivated to care so deeply and personally about the future of our organization.

As you consider a legacy gift, our team can help you explore the many ways you can meet your personal planning objectives while also achieving your charitable goals for **[YOUR CHARITY]**.

Sincerely,

**[SIGNATURE OF PRESIDENT OR BOARD CHAIR]**

**[PRINTED NAME AND TITLE OF PRESIDENT OR BOARD CHAIR]**

**[PAGE TWO]**

**[INSERT STORY OF YOUR LEGACY SOCIETY NAMESAKE. IF NONE, INSERT INFORMATION ABOUT YOUR MISSION, ITS IMPORTANCE AND HOW IT WILL BE REALIZED LONG-TERM.]**

**[PAGE THREE]**

**[NAME OF LEGACY SOCIETY]**

Established in **[YEAR LEGACY SOCIETY FORMED]**, the **[NAME OF SOCIETY]** honors the legacy and dedication of **[LEGACY NAMESAKE]**, whose vision for the future of **[YOUR CHARITY]** continues to help us today. Membership in the Society is conferred upon individuals who have committed to the long-term future of **[YOUR CHARITY]** through a legacy or endowment gift.

**Benefits of Membership**

When you establish your legacy gift or endowment, you join a select group of individuals who have expressed an enduring commitment to **[YOUR CHARITY]**. As such, you are invited to exclusive gatherings throughout the year, including the annual **[NAME OF LEGACY SOCIETY]** Luncheon. You will also receive a commemorative certificate and membership pin recognizing the lasting bond of your philanthropic support. Above all, you will have the certainty of knowing that your gift will continue to enhance **[YOUR CHARITY]**’s tradition of excellence while providing for the future.

**[IF AVAILABLE, INSERT QUOTE FROM OR ABOUT YOUR SOCIETY’S NAMESAKE; OR DESCRIPTION OF HOW THE NAMESAKE’S GIFT MADE A DIFFERENCE]**

**[PAGE FOUR]**

**Please Join Us**

**[YOUR CHARITY]** encourages you to help build upon our accomplishments through membership in the Society. If you have included **[YOUR CHARITY]** in your plans or created an endowment for its support, you qualify for membership. Qualifying legacy gifts include naming **[YOUR CHARITY]** as a beneficiary of your:

* Will or living trust
* Retirement plan
* Life insurance policy
* Payable on death account or
* Donor advised fund
* Also qualifying are individuals who set up other planned gifts such as:
* Charitable gift annuities
* Charitable remainder trusts or
* Charitable lead trusts

For more information about membership in the **[NAME OF LEGACY SOCIETY]** or to learn more about how you can establish your own legacy, please return the enclosed reply card or contact us at **[INSERT MAILING ADDRESS, PHONE NUMBER, EMAIL AND WEBSITE URL]**.