

AGENDA *for your* HERITAGE SOCIETY FORMATION MEETING

1. Agree on the Purpose of the Society (see attached template)
2. Define Criteria, Benefits

A. Criteria:

Open to anyone who has created a bequest in their will, made a life income gift naming your parish as the beneficiary, or made a gift of life estate, life insurance or cash gift to the endowment

Are there currently defined purposes for the use of endowment income?* Is there a designated gift policy in place?

B. Benefits:

Regular informational mailings

Annual opportunity to meet with the rector/leadership to discuss the future of your parish (can be combined with annual event)

Opportunity to be part of a special community

3. Set up a System:

A. To receive (enrollment form) and acknowledge enrollees (letter from rector)

B. To record, report information (such as number of enrollees, types of gifts)

C. To establish secure filing system (enrollment form, documentation of gift, end of life wishes, etc.)

4. Create Awareness:

A. Choose a name, develop a logo

B. Establish a "founding members" enrollment period (12 to 24 month period)

D. Make inaugural announcement (church announcement, newsletter, mailing)

E. Hold dedication event at the end of enrollment period

F. Hold an annual event (invite friends after initial dedication event)

G. Publish a brochure (you may replicate enclosed brochure)

H. Create a permanent visual display in church featuring the Society

I. Link Society to planned giving educational activities such as wills seminar, end of life planning meeting and other activities