



## **THREE REASONS TO HOST A “WILLS, ESTATES AND GIFT PLANNING SEMINAR”**

1. To educate and motivate each member to plan, prepare and have a will drawn up by legal counsel.
2. To help members learn estate planning methods which will help maximize benefits for themselves and their heirs.
3. To encourage gifts to the ministries of the church which are planned and coordinated with the members' objectives.

### **HOW DO WE ORGANIZE THE PROGRAM?**

1. Have the church council approve a “Wills, Estates and Gift Planning Seminar” for your congregation. Make clear that this program opens up a new avenue to your members to give support for the ministries of the church.
2. Appoint a chairperson who firmly believes in the value of this program. This person then enlists 3 to 4 persons to work with them.
3. The committee, with the pastor, implements the program promotion and arrangements as called for in the publicity packet provided by the Planned Giving Partnership for the Eastern North Dakota Synod of the ELCA. This process can take 2-4 months.

### **WHAT TOPICS WILL BE COVERED?**

1. Stewardship as responsible management of accumulated resources.
2. Tax laws affecting estates.
3. What happens if a person does not have a will?
4. Importance of choosing GUARDIANS, PERSONAL REPRESENTATIVES, TRUSTEES.
5. What are trusts, who are they for, and how do they work?
6. Ownership of property and its effect on estates.
7. Ways to plan gifts to your heirs that share your values and meet their needs.
8. Ways to consider giving gifts to favorite ministries.

### **WHAT ARE THE FIRST STEPS I SHOULD TAKE?**

1. Contact Julie Johnson, Coordinator for the Planned Giving Partnership at the Eastern North Dakota Synod office for the ELCA (701-232-3381 or 701-232-1480) for answers to any questions you may have about the format or scheduling of the seminar. Samples of printed materials are included in the Publicity Packet.
2. If needed, gain council approval.
3. Appoint chairperson or select committee to plan the seminar.
4. Have chairperson contact Julie Johnson to set date and time for seminar and secure materials for promotion.

## **TWO MONTHS BEFORE THE SEMINAR . . .**

- Post the posters in prominent locations in the church.
- The Committee conducts a WILLS SURVEY during the worship service, then tabulates the results and publishes this information in the following week's bulletin.
- Optional: The Committee publishes stories about members who have remembered the church and other charities in their wills in the congregational newsletter.

## **ONE MONTH BEFORE THE SEMINAR . . .**

- The pastor sends out letters of invitation to the entire congregation or to a selected list. Make follow-up phone calls one to two weeks following mailing (samples enclosed).
- The Committee makes copies of the ANNOUNCEMENT available to groups of adult members which meet during the month (adult forum, WELCA, men's groups, choir, committees, etc.) to be read at their meetings.
- A Committee member or other person gives a "Temple Talk" during the worship service to encourage people to think about their wills, related questions you may have and to attend the upcoming seminar. Use the ANNOUNCEMENT included in the Publicity Packet.
- The week before the seminar, insert bulletin insert "Thinking about Wills" in church bulletin. Order quantity from Julie Johnson.
- The Committee personally invites as many members as possible to attend the seminar.
- Optional: The Committee sends a press release describing the seminar to the local newspaper.

## **THE DAY OF THE WILLS, ESTATES AND GIFT PLANNING SEMINAR . . .**

- Have tables, chairs, pencils, a movie screen, and an extension cord available in the location of the seminar.

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