



# Planting Seeds for the Future

by Marie Leatherby

## Creating a Legacy Society for Long-Term Impact

### Slide 1: Introduction

**Title:** Why Legacy Giving Matters

**Talking Points:**

- Planned Giving allows donors to leave a lasting legacy beyond their lifetime
- It ensures financial sustainability for your mission
- It engages your most loyal supporters in a meaningful way

♥ *“Legacy giving is not about wealth — it’s about values.”*

### Slide 2: What is Planned Giving?

**Definition:**

Planned Giving is the process of making a charitable gift part of a donor’s estate or financial plan.

**Examples include:**

- Bequests (in a will or trust)
- Beneficiary designations (retirement plans, life insurance)
- Charitable gift annuities
- Real estate or stock gifts

✦ *Usually one of the largest gifts a donor will ever make*

### Slide 3: Why Start a Legacy Society?

**Benefits:**

- Honors and recognizes loyal supporters during their lifetime
- Fosters long-term relationships with major donors
- Encourages others to consider a legacy gift
- Creates a sustainable funding source for future generations

🌱 *Legacy donors become lifelong ambassadors for your mission*

### Slide 4: Steps to Establish a Legacy Society

## **1. Define the Vision & Goals**

- What impact do you want legacy gifts to fund? (Endowment, capital, programs)

## **2. Name the Society**

- Choose a meaningful name that reflects your mission or founding (e.g., Legacy of Life Society)

## **3. Create Simple Marketing Materials**

- Brochure, webpage, reply card, sample bequest language
- Include testimonials from current legacy donors

## **4. Launch & Celebrate Inaugural Members**

- Host a lunch, garden tea, or small recognition event

## **5. Stewardship & Follow-Up**

- Thank, update, and invite them to special events annually

## **Slide 5: Who Are Your Best Prospects?**

### **Focus on your most loyal supporters:**

- Longtime donors (5+ years)
- Board members and past board members
- Volunteers
- Staff and former staff
- Donors without heirs or with deep mission alignment

💡 *They care deeply — they just need to be asked*

## **Slide 6: Sample Legacy Society Benefits**

- Recognition in newsletters, website, and annual report
- Invitation to annual appreciation event
- Special legacy society pin or token
- Personalized communication from executive leadership


💬 *“Thank you for investing in our future.”*

## Slide 7: Tools You'll Need

- Legacy giving webpage
- Confidential “Letter of Intent” form
- Sample will language
- Professional advisor partners or referrals
- Staff training on how to talk about legacy gifts

## Slide 8: Launch Plan


- Announce society at Gala, donor event, or in newsletter
- Invite founding members (set a goal of 5–10 in year one)
- Follow up with personal calls and thank-you notes
- Plan inaugural recognition gathering within 6–12 months


 *Goal: Build awareness and trust, not pressure*

## Slide 9: Next Steps for Our Team

- ✓ Approve naming and purpose
- ✓ Identify 25 potential founding members
- ✓ Develop basic brochure and webpage
- ✓ Host first recognition event

## Slide 10: Closing Inspiration

 “Legacy is not leaving something *for* people. It's leaving something *in* people.” – Peter Strople

 Let's honor our mission by building a future where it thrives for generations to come.

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