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

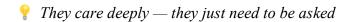
5. Stewardship & Follow-Up

• 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



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
- **o** 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

\bigcirc "I	legacy is not leaving	ng something for p	eople. It's leaving	g something in p	people." – Peter
Stropl	e				

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

For more information please contact:

Marie Leatherby Executive Director of Sacramento Life Center 916.451.4357