

Identify and Recruit a Planned Giving and Endowment Building Team

Leadership is important with any Planned Giving and Endowment Building Program. Beyond the pastor/organization leader, the Planned Giving and Endowment Building Program needs a chairperson and 4-8 additional team members. The team should be diverse and include some of the most respected, spiritually motivated friends of the organization.

Team members should:

- Be well known and respected in the organization and grasp the necessity of a planned giving and endowment building program
- Have been involved with the organization for a significant length of time and know many individuals and families who have also been involved for many years
- Attend Mass and/or events regularly and have demonstrated dedication to the organization's mission by actively participating in one or more ministries over the years
- Have donated financial gifts on a regular basis in support of the organization, ideally having established, or being willing to establish, a planned gift in support of the endowment fund(s)
- Have time to devote to the effort
- Have background or interest in stewardship, fundraising/development, sales, marketing, financial planning or estate law
- Be able to maintain confidentiality
- Be patient and passionate about the endowment fund
 - o Planned Giving and Endowment Building Programs do not reap immediate financial rewards; the team's task is to teach, plant seeds and convey the positive impact of planned giving on the ministry.

In addition to the above criteria, consider engaging professional advisors within the organization who can contribute to your Planned Giving and Endowment Building Program by virtue of their professional expertise. Consider individuals involved with the organization who are:

- Attorneys familiar with tax matters and estate planning
- Certified Public Accountants
- Involved with life insurance sales
- Certified Financial Planners
- Bank and Trust Officers
- Planned Giving Professionals in other organizations