

# Church

## 7 STEPS: START YOUR PLANNED GIVING PROGRAM TODAY

BUILD LEGACIES. EMPOWER GENEROSITY. SUSTAIN MINISTRIES

- ☐ **Step 1:** Make sure church is in compliance: consult legal, tax, and financial advisors
- ☐ **Step 2:** Form a planned giving team: a group to focus on planned giving
- ☐ **Step 3:** Establish a Bequest/Gift Acceptance Policy: what gifts will church accept
- ☐ **Step 4:** Inform and educate congregation on the importance of financial wellness, estate planning, and legacy giving
- ☐ **Step 5:** Promote wills and bequests: emphasize stewardship of assets, and the impact legacy giving will have on missions for generations
- ☐ **Step 6:** Recognize and thank donors who make planned gifts; foster a culture of generosity; create a Legacy Society
- ☐ **Step 7:** Start today – revisit steps 1-6 above

### CONTACT US

**Email:** [info@johnsonbetts.com](mailto:info@johnsonbetts.com)  
**Visit:** [www.JohnsonBetts.com](http://www.JohnsonBetts.com)  
**Call:** 888-832-1424



**Aquanetta Betts**  
Founder & Principal Consultant  
Johnson Betts, LLC



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