

How to Create a Legacy Society Enrollment Form

For more information, see Funding Future Ministry Chapter VII Establishing a Legacy Society.

Once you have defined and publicized a Legacy Society, you will need a way to keep track of members. Establish systems for:

- enrolling members,
- promptly acknowledging commitments,
- thanking members for their generosity, and
- filing important papers in a reliable and confidential location.

In addition to a Legacy Society brochure with a response form to generate awareness, create an Enrollment Form so givers can declare their commitments and join the Legacy Society.

Sample text:

To the glory of God and in thanksgiving for the mission and ministry of God’s church, I/we have made a gift for the future ministry of St. Swithin’s. I/we accept the invitation to join the Legacy Society.

I/we consent for my/our name/s to appear with others on the public roster of the Legacy Society.

On the roster of the Legacy Society, I/we wish my/our name/s to appear as:

I/we wish to remain anonymous.

Signature _____
Date

Name/s

Address, City, State, Zip

Phone, Email

Please send this form to: Planned Giving Chair, St. Swithin’s Church, Anywhere, USA