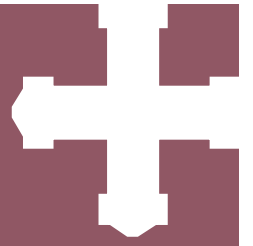


Sample Planned Giving Welcome Letter

Resource 2.48



New members of the planned giving society (final major gift)

(Sent with the large-format planned giving “Stewards of God’s Bounty” magazine from The Episcopal Church Foundation, purchased through Forward Movement, for their use with their financial planner.)

Dear _____:

Thank you for your generous willingness to remember the _____ in your estate plans. _____ church’s ministry is a good investment of your philanthropy and we are mindful of the great responsibility of using this gift for the work Christ would have us do in the future.

Many have gone before us as ancestors to what we now enjoy as a church and what now serves the city of Denver in so many ways and for so many communities of human need. Those who went before us remembered the cathedral in their estates; and so now, as we do the same thing, we are providing for future ministries among future generations with our planned gifts.

As you make decisions about everything from living wills to planned giving financial tools, we are able and willing to assist in any way we can. Your financial and legal advisors will advise you as to what best suits your needs and your philanthropic interests, however I have enclosed a brochure called “Stewards of God’s Bounty” so that you have ready access to a summary of various tools and issues in making this planned gift.

Please do be most welcome to attend the annual (name) Society luncheon on June 14th after the 10:00 service in the gardens and in (place). And please do not hesitate to contact me if there is anything I can do to assist you in this process of discernment and this act of great generosity.

Warmly and with gratitude,

Ruthie Cohen
Stewardship Chair