

Legacy strategy template



This framework has been designed to help you think about the big picture of what you want your church, and any legacies left to your church to achieve - so that you can convey a compelling reason why they should remember you in their will. First, be sure to take a little time to 'step back' and think strategically before thinking about the detail to support your legacy giving.

Legacy Vision What are we hoping to achieve?	
Mission What are we doing that people will want to leave a legacy to help with?	
Audiences Who do we want to communicate to about legacies?	

Messages

What things should we say that will communicate our vision to our audiences?

Channels

What mechanisms will help us reach our audiences now and in the future? (e.g. email, leaflet, talks)

Measurement

How will we know if we have been successful (e.g. can we track how many people have made pledges to leave us a legacy?)

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