

BEQUEST FACTS

Approximately 67% of households report donating to charities in recent years, only a small minority (8%) report leaving a charitable bequest in their wills. Research by the Center on Philanthropy at Indiana University reveals:

- One in three surveyed respondents indicated that they currently did not have a charity named in their wills but would be willing to consider adding one.
- Individuals with a charity in their will donated more than twice as much money (over \$2,000 more on average) in any given year than those who did not have a charity in their will.

AGE

- The Boomer generation (ages 40-60) were found to be a significant share of those who have already named a charity in their will and also those who are willing to *consider* making a bequest.

MOTIVATION

- The three most likely motivations for charitable giving, elected by people with a charity named in their will, were “helping others;” “religious beliefs;” and “giving back to society.”

INCOME

- Income was not found to affect the likelihood that a donor would bequest, or consider the bequest of a charitable gift in his/her will.

BEST CHANCE

- Individuals between 40 and 60 years of age who were employed and had a household income between \$50,000 and \$75,000 were in the group with the highest likelihood of naming or considering naming a charity in their will.

RETIREES

- Only a small percentage (4%) of retirees had named a charity in their will, but approximately 1 in 4 would consider doing so.

To increase the number of wills that include a gift to the church, we must

- Cultivate and educate all donors
- Target donors by age (new parents – often a time for a first will, pre-retirement planners, older adults – 65+)
- Focus on individuals who are educated about the opportunities **and** motivated by a desire to do good.



GETTING STARTED WITH PLANNED GIVING

BEQUEST ONE-LINERS

*USE THESE ONE-LINERS IN YOUR NEWSLETTER OR BULLETIN REGULARLY
AS A REMINDER TO YOUR CONGREGATION ABOUT LEAVING THEIR LEGACY TO THE CHURCH*

1. Invest in the future. Remember the church in your will.
2. Six out of ten Americans do not have a will. Do you? Did you remember to include your church?
3. Be part of the future. Remember the church in your will.
4. Make the BIG GIFT you always dreamed of. . . Remember the church in your will.
5. Help build dreams. Remember the church in your will.
6. Impact the future of the church. Remember the church in your will.
7. You can make a difference. Remember the church in your will.
8. Make sure the church is here tomorrow. Remember the church in your will.
9. Touch the future. Remember the church in your will.
10. We depend on our church. Can it depend on us? Remember the church in your will.
11. Want to hear, "Well done, faithful servant?" Remember the church in your will.
12. Maintain your lifestyle AND leave a legacy. Remember the church in your will.
13. Leave your mark on the future. Remember the church in your will.
14. Guarantee your last wishes will be followed. Remember the church in your will.
15. A perfect way to honor loved ones. Remember the church in your will.

Contact The United Methodist Foundation for sample bequest language, to arrange a presentation or seminar on estate planning and planned giving, or individual assistance in planning a legacy gift.

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