

CALIFORNIA-NEVADA UNITED METHODIST FOUNDATION

A WILLS EMPHASIS PROGRAM IN YOUR LOCAL CHURCH

Introduction:

After an endowment program is established, an appropriate first step in promoting your local church planned giving ministry is to enter in to a wills emphasis program. Such an emphasis provides a needed ministry to members as they plan ahead for the care of family and loved ones and will also serve to encourage gifts for the future ministry and mission of the church. Such an emphasis provides a needed ministry to members as they plan ahead for the care of family and loved ones and will also serve to encourage gifts for the future ministry and mission of the church.

It is estimated that approximately 70% of all Americans die without a will. In addition, many wills prove to be outdated and inappropriate to the circumstances and commitments at the time of death. Statistics on United Methodist members are not available, but it is likely that there are a great number that do not have a will. And of those who do, only a few have included a bequest for their local church or agency.

Purpose of Wills Emphasis:

The purpose of a local church's wills emphasis is threefold:

1. To challenge each adult member to make a will without delay.
2. To persuade each member to review
3. his or her will annually and update it in light of changed circumstances and commitments.
4. To encourage each member to bear testimony to his or her faith by including some provision in the will for the future support of the ministry and mission of your United Methodist church or agency.

Development of a Wills Emphasis Program:

The staff at the California-Nevada United Methodist Foundation is available to work with your committee to develop the plan best suited for your congregation. Suggestions and samples of materials are available to assist you in selecting what your congregation is most likely to view in a favorable light. Brochures are available from the Foundation office.

"Love each other as
I have loved you."
John 15:12



A CHECKLIST FOR PLANNING A WILLS EMPHASIS PROGRAM

First Steps:

- Have an endowment policy adopted by the congregation; be prepared to receive bequest.
- Consider what group should be responsible for planning and promoting the program—perhaps a task force appointed by the church governing body, an existing committee, etc.
- Have individuals of that group read about “wills emphasis” in the materials provided.
- Consider whether to seek outside assistance in planning the program such as the Foundation staff and/or other consultants.
- Schedule a meeting with the planning group, allowing about 1-½ hours for the meeting.

Planning Meeting: At the planning meeting, begin with basic information about wills emphasis, including:

- The importance of making and updating a will.
- The purpose for a wills emphasis: to challenge each member to make a will, to persuade each member with a will to make a periodic review, and to invite each member to remember the church in his or her will.
- Consider the use of the wills survey or other way of determining the need for a wills emphasis program in this congregation.
- Identify professionals available in the congregation or community that may assist.
- Develop a plan for a specific period, perhaps six or nine months, being sure that it fits into other existing plans of the congregation and into the special celebrations of the congregation. Consider using the following elements in your plan:
 - Articles in the newsletter.
 - Special mailing with a brochure.
 - Small group meetings (existing groups or special groups) in members’ homes.
 - A wills event for the congregation, with professionals invited in as resource persons.
 - Opportunities for individual counseling and referral.
 - Sermons.
 - Acknowledgment of bequests with thank you notes and with membership in the Foundation’s John Wesley Society.

Implementation:

- Make a proposal to the church governing body for adoption or approval.
- Implement the wills emphasis program as planned by the committee.
- As closure, plan an evaluation and reporting time to the congregation.