

Planned Giving Partners Webpage Enrollment Form

OVERVIEW

The Catholic Foundation has partnered with Catholic parishes, schools and organizations within our Catholic community to help them establish their own planned giving programs. The Planned Giving Partners Webpage provides another avenue for participating institutions and The Catholic Foundation to create mutual awareness about their own planned giving programs and attract donors to consider remembering their favorite Catholic parish, school or organization with a generous gift after they are gone.

HOW THE CATHOLIC FOUNDATION ASSISTS INSTITUTIONS WITH PLANNED GIVING

- Prepares a customized packet and USB drive of planned giving information that organizations can utilize and modify as they see fit to promote planned giving as a way for donors to have a deeper relationship with them
- Makes presentations to staff and lay leaders about how to incorporate planned giving into existing electronic and paper marketing materials
- Serves as a resource for parishes, schools & organizations to appropriately respond to prospective donors who want information about how they can make gifts from their estates
- Establishes both endowment-style and non-endowment-style funds to aid organizations in providing trusted stewardship for their planned gifts
- Helps to promote planned giving programs at individual parishes, schools and organizations throughout our Catholic community.

CRITERIA

Catholic parishes, schools and organizations are eligible to participate in the Planned Giving Partners Webpage if they:

- Have a planned giving page on their website or have language on their website that makes donors aware of how they can include that institution in their estate plans,
- Would allow The Catholic Foundation to put their institution's logo and a link to their planned giving information on The Catholic Foundation Planned Giving Partners webpage,
- In turn would reciprocate by putting The Catholic Foundation's logo and link to the Foundation's website in an appropriate spot on their webpage, and
- Affirm participation in the program with the signature below of the Pastor, Principal, President or Executive Director of the organization

ENROLLMENT

_____ We agree to the criteria above and want to be included in the Planned Giving Partners program. Information on an appropriate contact person is provided below my signature.

Signature

Title

Organization

Contact Person

Phone Number

Email Address

Please return signed form in the envelope provided – thank you!