

Our Church's Estate Planning Seminar Planning Sheet

In collaboration with Lutheran Planned Giving Services (LPGS) – Nebraska
Your Resource when Planning for Loved Ones and Ministry
402-342-5728 ~ Toll Free: 888-891-5728 ~ Cell: 402-61-0312 ~ cstirtz@lpgs.org

Congregation

Pastor &/or Seminar Planner

Address

Phone – Contact Info

Seminar Date

Second Planner / Organizer

Seminar Time

Phone – Contact Info

Room / Location of Seminar

Time of Meal ___ or Refreshments ___

PLANNING DETAILS –

To Do – Months Before Seminar

- ___1. Two - three months before seminar - after seminar has been approved by appropriate church leadership & scheduled with LPGS - plan & schedule announcements, invitations, telephone calls & reminders. (Sample verbiage in planning packet.) Plan that Pastor & leadership be present at seminar.
- ___2. Two months before seminar, LPGS Posters are posted. (Posters in planning packet.) Meet or conference call with LPGS representative to track planning progress.
- ___3. One month before seminar, Church leadership makes phone calls, sends invitations and plans church member temple talks for the week before and the week-of the seminar. (Sample verbiage in planning packet.)
- ___4. One month before seminar, includes seminar announcement and details in church newsletter, bulletin and Web site. (Sample verbiage in planning packet.)

To Do – Weeks Before Seminar

- ___5. Two weeks before seminar, announce church member temple talk and provide verbiage for bulletin or copy sample bulletin “Our Church’s Estate Planning Seminar”. (Original bulletin insert is in planning packet.)
- ___6. The week of the seminar, include announcements for Lutheran Planned Giving Services and Craig Stirtz. Announce church member temple talk and provide verbiage for bulletin or copy sample bulletin “Our Church’s Estate Planning Seminar”. (Original bulletin insert is in planning packet.)

To Do – Days Before Seminar

- ___7. The day of the seminar, Craig Stirtz from LPGS is scheduled to:
Attend Services for introduction _____ ~ Service Time(s) _____.
- ___8. The day of the seminar, Craig Stirtz will be presenting:
After our church service(s) ___ Other time when a full hour can be scheduled ___ .
- ___9. The day of the seminar, church leadership will be present:
Pastor ___ Church Committee(s) Rep ___ Known church member(s) who have remembered church-wide ministry or congregation in their estate ___ .