

# 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 \_\_\_ .