



Communication Legacy enquiries

Introduction

When the first Giving in Grace programmes were run in parishes in Liverpool in the autumn of 2005 the interest expressed in legacies took everyone by surprise. Neither parish planning groups nor the authors of the programme had anticipated the volume of enquiries arising from the legacies tick box on the response forms.

On reflection, of course, there should have been no surprise. One of the key reasons that people do not leave a legacy is quite simple: no one has ever asked them to do it! Anxiety over both money and death conspires to keep the issue quiet. One pastor was concerned that members of the congregation were not leaving wills to his church and worried if they were not valuing his ministry. Eventually, plucking up courage to ask relatives of one member he was amazed and relieved by the reply: *"We've never thought of the church like that before"*.

Legacies: part of stewardship

Leaving a legacy should be a natural and normative element of Christian stewardship. At the heart of financial discipleship is the biblical practice of planned giving. To leave a legacy simply applies this godly principle to the whole of our estate and not just to our disposable income. Accordingly it is right and appropriate that the invitation to leave a legacy should be embedded into the routine practice of stewardship in the local church.

However, a legacy is just one element in the wider and important discipline of making a will and, just as importantly, ensuring that the will is updated to reflect changes in personal circumstances. The stewardship principle applies not just to the legacy

but also to the preparation of the will that contains the legacy. The will is itself the exercise of stewardship, providing for family and those we love as well as providing for those causes which we have supported throughout our lives.

- Making a will is an act of wisdom, kindness, provision and love for those closest to us. Providing for our families is understandably the primary motivation in leaving a will. However, it takes wisdom and thought to know how best to do that, especially where large sums are involved. By contrast failure to make a will or leaving an inadequate will may bequeath enormous problems for those we leave behind and create an obligation for inheritance tax.
- Making a will is spiritual act because it involves preparation for our own mortality. This is what Archbishop Cranmer had to say in the Prayer Book some 500 years ago: *"And if he have not before disposed of his goods, let him then be admonished to make his Will, and to declare his debts, what he oweth, and what is owing unto him; for the better discharging of his conscience, and the quietness of his Executors. But men should often be put in remembrance to take order for the settling of their temporal estates, whilst they are in health."*
- Making a will applies the principle of Christian stewardship to the whole of our estate and not just to our disposable income. Research for the Kingdom Bank in 2005 indicated that 23% of evangelical Christians had left a legacy in their will. This compared favourably with the 14% of the general population whose published will contained a legacy. Nevertheless it remains true that Christians who otherwise are faithful and generous in their practice of planned giving struggle to apply this formative biblical principle to their estates.



Because a legacy is neither a casual nor a spontaneous decision responding to requests for information on leaving a legacy must reflect the significance of this decision and be managed with sensitivity and care.

- In the busyness of administering and running a Giving in Grace programme it is all too easy to be caught out by a request to discuss a legacy and to make mistakes. Prepare legacy literature in advance of the programme and ensure that it is of good quality and accurate. This is a worthwhile investment because this material will be useful and used as part of ongoing legacy promotion.
- Visit the website www.churchlegacy.co.uk to explore a wide range of resources to support a response to a legacy enquiry. Templates of leaflets are provided, the draft text of a PCC legacy policy and helpful literature pertaining to a visit to a solicitor to prepare or amend a will.
- There is one cardinal rule for the visitor who responds to a request for information about legacies: **Never Give Advice**. The only advice it is ever appropriate to give is "*talk to your solicitor*". Do not get drawn into discussing details of a will or a legacy gift to the church either in the visit or in any subsequent social or church contact. Visitors must be very careful to never unduly influence or appear to influence the potential legator.
- Care should be exercised in the choice of who will make the requested visit. Sensitivity is needed and some familiarity with the essentials around wills and legacies. Remember the aim is to help people think through the issues and options in general terms to help them prepare for a visit to a professional. While some churches will already have Legacy Officers it is not necessary to appoint someone formally for this task. Best practice is the appointment of a [Parish Giving Officer](#).

- The crucial qualification is that the person making the visit should himself or herself have already prepared a will and left a legacy to the local church. No visitor can convey passion and commitment to a cause that they themselves do not support in the same manner as they invite others to do so.
- The visitor is there by invitation to provide information requested. That is the purpose of the visit so let the literature prepared by the church make the case for leaving a legacy. Extensive resources can be found at the church legacy web site. The visitor should take this literature on the visit and leave that which is requested.
- Death and money are never easy subjects for discussion but the visitor should remember that they are responding to a request that has been made. Be natural and be confident; for all that it is more complex a legacy is one form of planned giving, one way in which Christians apply biblical stewardship principles in their lives.

Promoting legacies

Promoting legacies should be a natural and normative element of ongoing stewardship. A Giving in Grace programme can provide the initial momentum to develop a low key, sensitive and sustainable legacy initiative in the church. Again the excellent website www.churchlegacy.co.uk is commended as the source of good thinking, best practice and quality resources for ongoing legacy promotion.

