



**FIRST PARISH IN CONCORD  
LEGACY GIVING COMMITTEE**

Meeting Minutes October 4, 2017

The meeting started shortly after 7:30 pm in the Brooks Room.

<b>Present</b>	Tom Wilson, Fifi Ball, Laura Bernstein, Philip vanderWilden
<b>Discussion/ Decisions</b>	<p>Fifi handed out a list of individuals who have joined the First Parish Legacy Circle. There are 5 individuals on this list. See Fifi if you want to know who they are. One of our member – Mr. Fred Van Deusen is a proud member of this group. Congratulations.</p> <p>We discussed and determined actions related to the upcoming Forum programs sponsored by the Legacy Giving Committee</p> <p>October 15, the Trustees will run the program for “Meet Your Trustees” The purpose is to provide background information to the congregants so they have more awareness and confidence in the work of the Trustees. Laura provided and discussed the proposed agenda. The specific details will be discussed at the upcoming Trustees meeting this week. Tom is to send a brief note to see if something could be promoted in FP Announce and the Sunday News.</p> <p>We discussed the Nov. 12 second LGC sponsored event that will focus on Estate Planning and building a legacy. We concluded that we would use a panel discussion, and Tom would invite Byron Woodman an estate attorney with long, deep roots in Concord. We are soliciting a second expert panel member from inside or outside FP. The primary requirement is that their talks should be content rich, informative and not a marketing pitch. The focus of the program will be on providing information about Estate Planning and other documents to get your “house in order.” This will also include discussion of alternatives for setting up a Legacy commitment to First Parish. Plus, we will announce and describe the Peter Buckeley Living Legacy Program, to encourage people to provide their legacy gift while they are still alive! Laura and Tom will prepare some marketing materials for the program to appear in the various channels. Tom will also talk to Howard about whether it would be appropriate to announce this program from the pulpit.</p> <p>We ended promptly at 9:00 and scheduled the next meeting for Nov. 1 or 2<sup>nd</sup>. Watch for invite for this meeting</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Philip and Laura will work with the Trustees to develop 10/12 program</li> <li>• Tom will send notice to see if announcements can be made for this program</li> <li>• Tom and Laura will prepare promotional materials for the 11/12 meeting</li> <li>• Tom will contact Byron Woodman about presenting at the 11/12 meeting</li> <li>• We all will identify a second presenter for the program, give ideas to Tom</li> <li>• The Nov LGC will focus on agenda and final details for this program</li> </ul>
<b>Next Meeting</b>	November 1 or 2

The meeting was adjourned at 9:05 pm.

Respectfully submitted, Tom Wilson