



**FIRST PARISH IN CONCORD  
LEGACY GIVING COMMITTEE**

Meeting Minutes June 7, 2017

The meeting started shortly after 7:00 pm in the Brooks Room.

<b>Present</b>	Tom Wilson, Fifi Ball, Patty Popov, Laura Bernstein, Philip vanderWilden and Fred Van Deusen
<b>Discussion/ Decisions</b>	<p>On the recent Congregational Survey 29 people of those who responded said they have put First Parish in their wills, and 4 said they planned to. We agreed to try to identify them and ask them to complete a Legacy Giving Form as part of our upcoming promotion program. We also agreed to simplify the form a bit.</p> <p>A parishioner wants to make an anonymous “living Legacy” gift to First Parish and encourage others to make legacy gifts as well. We decided not to use this gift to match other contributions, but instead agreed to establish the Peter Bulkeley Living Legacy Fund and to promote this initial donation as part of our promotion program.</p> <p>We agreed on several activities/events for our Legacy Giving promotion program. Events will be publicized in the Meeting House News and FP Announce.</p> <ol style="list-style-type: none"> <li>1. Copies of the brochure and Legacy Giving Form will be available to pick up at the annual meeting on Sunday.</li> <li>2. A member of the Legacy Giving Committee will talk about the program, upcoming events, and the good news of the anonymous gift, at a Sunday service a week before event #3. We may include our brochure in the Sunday news for that date or the following week.</li> <li>3. In October (targeting 15 or 22) we will have an educational event (perhaps at the Sunday forum) focused on the Trustees and how the Legacy Investment Fund is managed. The Legacy Giving Program will be mentioned as part of this event.</li> <li>4. In November (targeting 5 or 12) we will have another educational event focused on financial planning at various life stages, co-sponsored by the Legacy Giving Committee and the Pastoral Care Council.</li> <li>5. We plan to have the first Legacy Circle celebration event in early December.</li> </ol> <p>Tom agreed to chair the committee going forward after being strongly encouraged by all of us. We all agreed to stay on as members.</p>
<b>Actions</b>	<ul style="list-style-type: none"> <li>• Philip will work with the Trustees to schedule event #3.</li> <li>• Laura will investigate the Forum schedule for events 3 and 4.</li> <li>• Tom will talk with Howard about activity 2 and begin to organize and schedule event 4.</li> <li>• Fred will update the Legacy Giving Form and write the minutes.</li> </ul>
<b>Next Meeting</b>	September, date and time to be decided

The meeting was adjourned at 8:40 pm.

Respectfully submitted, Fred Van Deusen