



**FIRST PARISH IN CONCORD
LEGACY GIVING COMMITTEE**

Meeting Minutes November 1, 2017

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

Present	Tom Wilson, Laura Bernstein, Patty Popov, Fred Van Deusen
Discussion/ Decisions	<p>We discussed the Nov. 12 LGC sponsored event that will focus on Estate Planning and Legacy Giving. The agenda will be something close to this:</p> <ul style="list-style-type: none"> • Introduction – Tom (5 min) • Estate Planning – Peter Johnson (20 min) – elements of an estate plan, what’s important, approaches for making allocations, how it can evolve over time based on life stage and other variables • Questions and Answers – Patty and Peter (15 min) – e.g. How much should I give to my kids? How much will healthcare cost? How do I decide how much to give to organizations such as First Parish? • Legacy Giving – Tom and Patty (20 min) – review various options from brochure and talk about why you should choose one over another, as well as living legacy gifts; brief discussion of Legacy Circle membership <p>We also talked about what should be done for Legacy Circle members. We agreed there are too few to do something in the near term. The ideas of having an engraved glass given to each member, having a wine tasting, or participating in an interesting event as a group all showed promise.</p>
Actions	<ul style="list-style-type: none"> • Tom will prepare final promotional materials (100 words) for the 11/12 forum by Friday at 3pm and send to Sarah Burns for FP Announce & Sunday News, and Pat Brinkman for forum, and to all of us for distribution • Tom will contact Peter Johnson and discuss what he should present on 11/12 • Tom will talk with Howard about what he should say about the forum in his closing remarks • Tom or a person he asks will collect and bring the following materials to the forum <ul style="list-style-type: none"> • FP LGP brochures • Legacy Gift Forms • Some copies of the Legacy Giving Program Guide (Fifi should have these as well as the forms and maybe some brochures) • Tom will develop any needed presentation materials for his pieces (e.g. agenda, list of legacy giving options) if he so desires • Each of us will invite some people to attend the forum using materials provided by Tom
Next Meeting	tba

The meeting was adjourned at 9:00 pm.

Respectfully submitted, Fred Van Deusen