



Legacy Liaison Overview

What is a legacy liaison? A champion to promote the growth of your organization's endowment fund through current and legacy gifts

Responsibilities of a Legacy Liaison

- Facilitate opportunities for the Catholic Foundation staff to speak with support groups (i.e., finance council or development team)
- Coordinate parish Endowment Sunday or life and legacy planning event
- Coordinate school charitable giving event for parents and grandparents
- Ensure that "Ways to include Parish/School in Will" is promoted in communication materials and on website
- Attend biannual meeting to collaborate with other parishes and schools on ideas and best practices

Tools Provided to a Legacy Liaison by the Catholic Foundation

- Strategies on how to increase gifts to the endowment fund for the future of the organization's mission
- Direct support from the Catholic Foundation's complimentary philanthropic giving services
- Training on the various ways donors can make a legacy gift to support your organization
- Marketing materials and online resources to promote planned giving
- Communications/newsletters with helpful information on planned giving

Ideal Candidate

- Involved in parish leadership ministries or school development team
- Fundraising or development experience
- Has already included a charitable gift to their parish or school in their will or estate plan
- Passion for the mission and the future of the organization
- Attorney, CPA or financial advisor