



Checklist to Create a Planned Giving Program

- ☐ Establish consensus among leadership that a planned giving program will be a positive and permanent addition to the organization's culture.
- ☐ Connect with a Foundation representative to gain assistance in the process.
- ☐ Gain Board approval to establish an endowment fund and an endowment program through an official resolution.
- ☐ Establish a spending policy that honors donor intent, directs unrestricted planned gifts to the endowment, and sets the process and purposes for the use of the annual distribution from the endowment.
- ☐ Form an endowment committee of interested and experienced donors and staff.
- ☐ Write a case statement outlining the purpose of the endowment to share with members.
- ☐ Establish a bequest program to support endowment growth.
- ☐ Complete an endowment agreement with the Science of Mind Foundation.
- ☐ Transmit a minimum of \$25,000 to start an endowment fund at the Foundation.

Refer to the Foundation's program guide, "Endowments and Bequests--A Planned Giving Program Primer" for details on each of the above steps, guidance for creation of a bequest program, and sample materials the Foundation can provide.