

# Planned Giving

## Basic and Intermediate

# Agenda

1

OVERVIEW

Expectations  
& Capacity



3

COMMUNICATE

Inviting members  
to the opportunity



4

RESOURCES

Demo



Accessing your kit:  
[StewardshipNavigator.org](https://StewardshipNavigator.org)

1

# PLANNED GIVING OVERVIEW

# What is planned giving?



# WHAT IS IT?

To me the  
donor

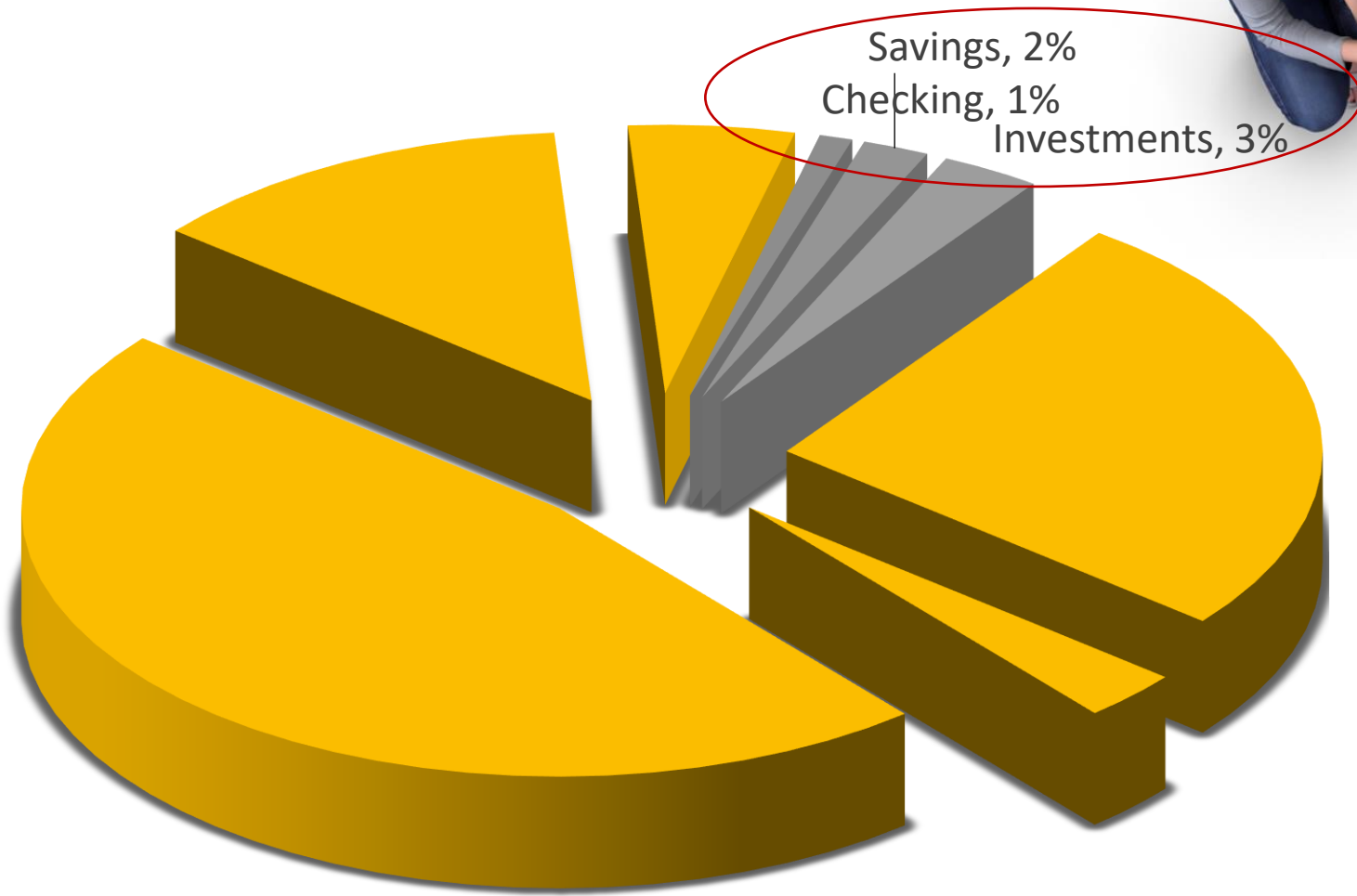
it is the

**greatest gift**

I will ever  
make.

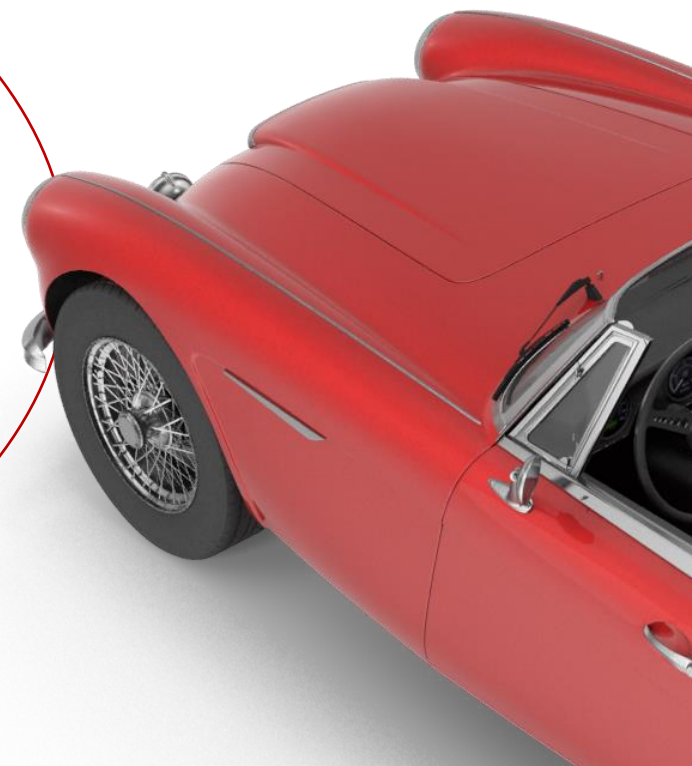
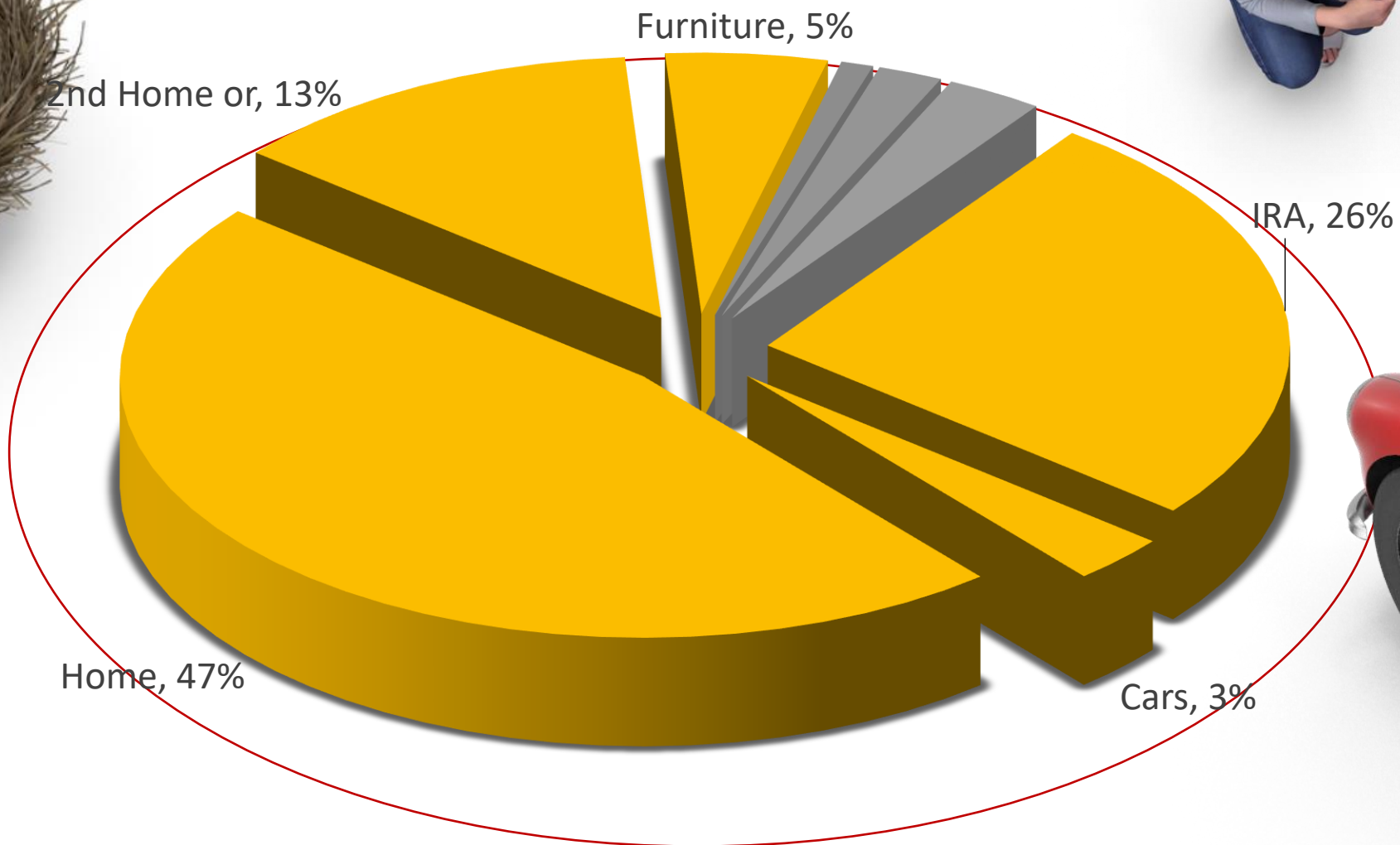
# PLANNED A GIFT

## The GIVER



# PLANNED GIFT

The  
GIVER



## WHAT IS IT?

To me the donor  
it is the  
**greatest gift**  
I will ever  
make.

To my church  
it is the most  
**transformative gift**  
I will ever give.



# Planned Giving

How big is it?



2022  
Bequests

\$45,600,000,000

# 163,430 Feet



How big is  
\$45.6 Billion

# Relative Size

PLANNED GIVING

ANNUAL  
GIVING  
(lifetime)

2.74X

Lifetime annual giving

# How much does the average Presbyterian church receive?

- a.) \$0
- b.) \$10,000
- c.) \$30,000
- d.) \$60,000

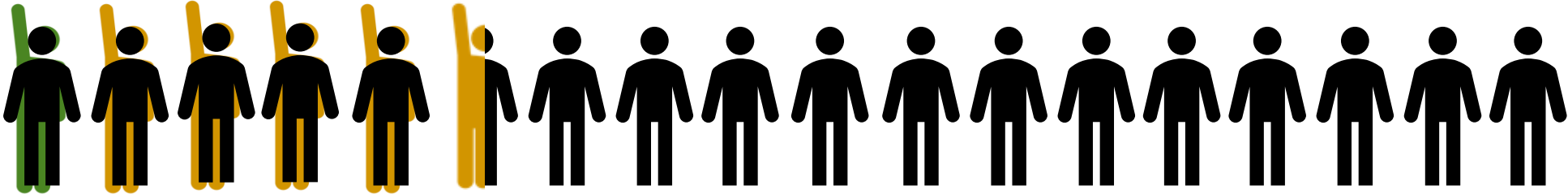


QUIZ

**How many people  
make bequests?**



# Un-tapped



5%

leave a bequest?

28%

would leave a bequest?  
If asked or reminded

# Who makes planned gifts?





# Average age of a planned giver **writing a first will**

## Trigger events:

- 39% Increased assets
- 28% Marriage
- 18% Birth of child
- 12% Death of loved one
- 10% General life plan
- 5% Divorce

**44**  
Years Old

53

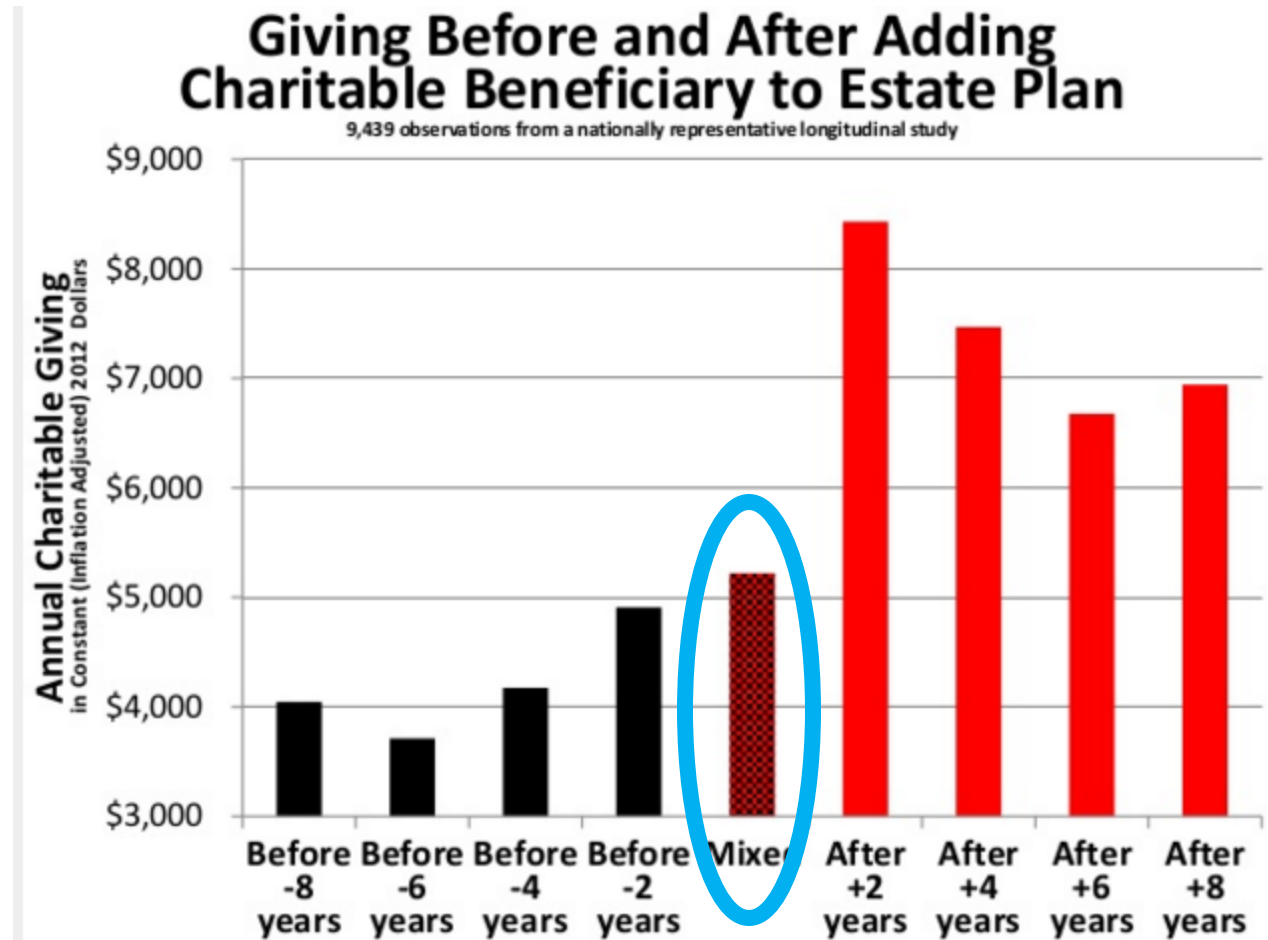
Years Old

...is the average age for making  
a **first charitable planned gift**

**Does planned giving  
hurt annual giving?**



# Planned Giving



Data from presentations by Russell James, Texas Tech University

# WHO MAKES A PLANNED GIFT

	... for their lifetime	Open
Regular givers		Inclined
Regular volunteers		Favorably Inclined
Participate(d) in leadership		VERY Inclined
Spend life's most important moments here	Having our audience meet within our walls every week.	Pillar

Why is  
Right-Sized  
important?

Basic  
+++

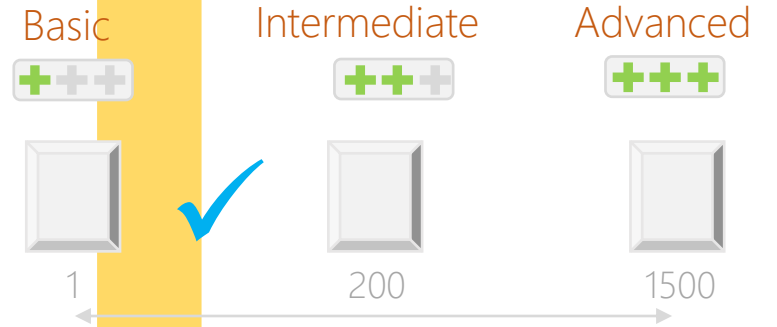
Intermediate  
+++

Advanced  
+++

Right-Sized



Membership



Team Members

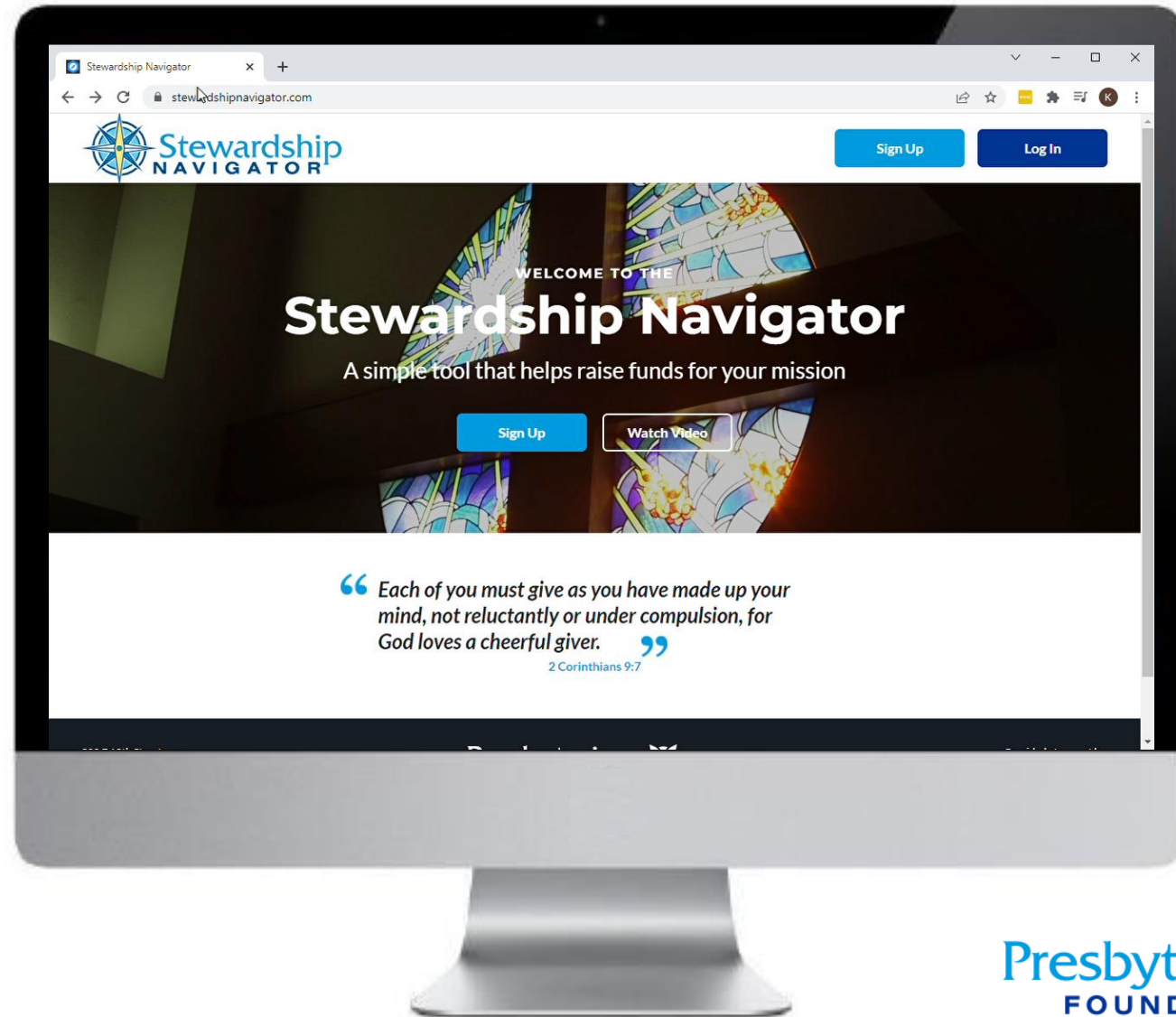


Hours/Month



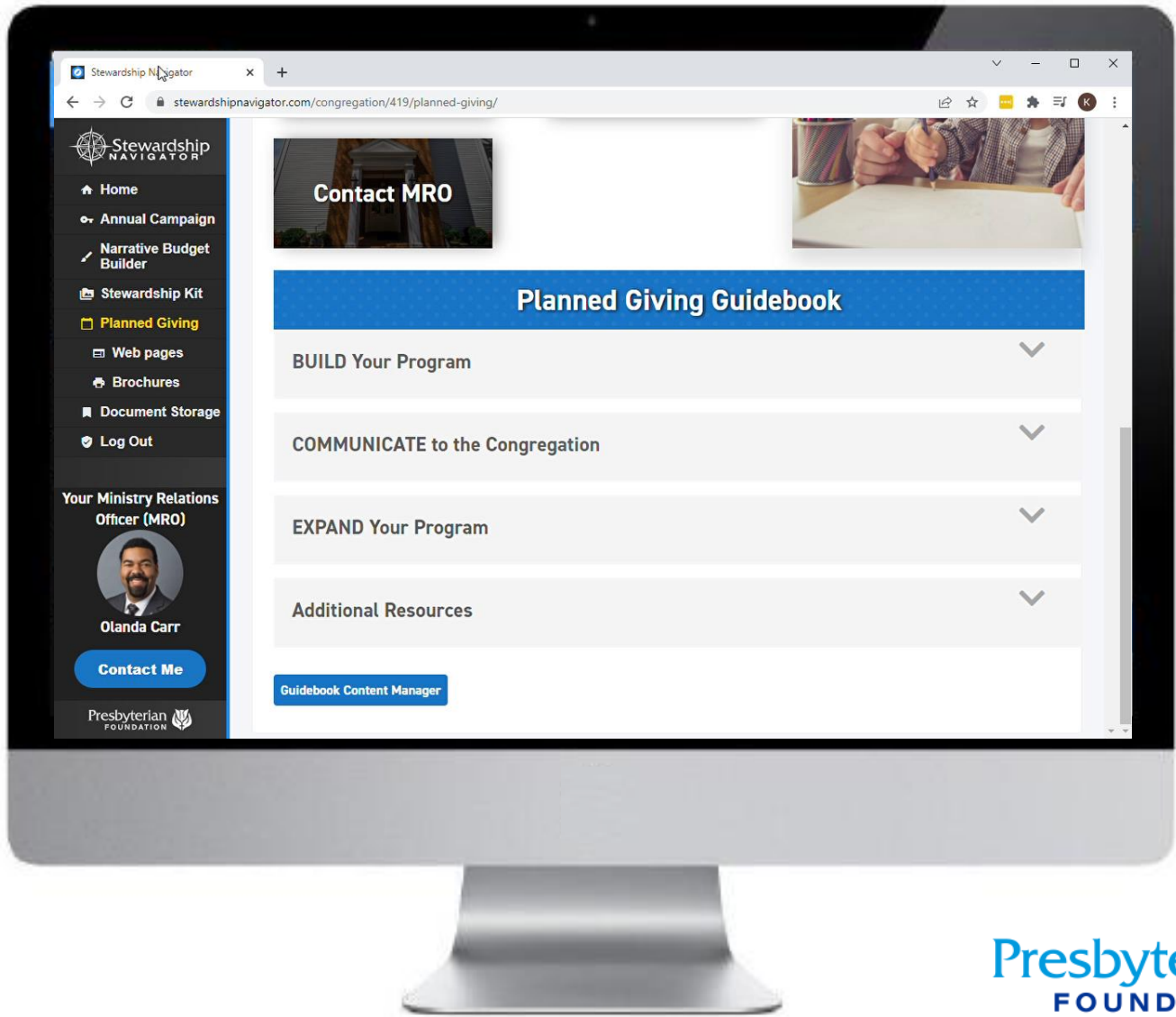


# Accessing Your Kit



# BUILD Your Program

Here's where to go...



2

# COMMUNICATE

to the congregation

## *Sharing*

the opportunity to create a legacy  
the gratitude for these gifts  
the stories of the givers  
the impact their gifts have had

# Basic

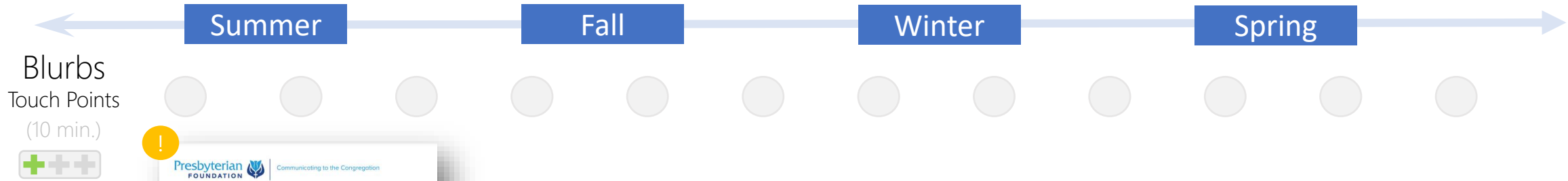


PG Web Pages



*“A legacy speaks not about how we died, but how we lived. It speaks about the things that move us in life, the things that matter to us. A legacy is an expression of gratitude and thanks to God for all that has been given and enjoyed in life.” (Stewardship.org.uk)*

*What will your legacy say about you?*



**Presbyterian FOUNDATION** | Communicating to the Congregation

**TOUCH POINTS**

Use these Touch Points to help people catch the vision behind your Wills and Legacy Giving Program. As part of your overall communication plan, use them in your bulletins, social media posts, newsletters and other outreaches to members of your faith community.

**QUOTES ABOUT GIVING**

- I've learned that you shouldn't go through life with a catcher's mitt on both hands. You need to be able to throw something back. — Maya Angelou
- Deeds of giving are the very foundations of the world. — Jewish proverb
- What is the use of living, if it not be to strive for noble causes and to make this muddled world a better place for those who will live in it after we are gone? — Winston Churchill
- What we do for ourselves dies with us. What we do for others and the world remains and is immortal. — Albert Pike
- In our good works, nothing is our own. — John Calvin
- We are only trustees for those that come after us. — William Morris
- How lovely to think that no one need wait a moment; we can start now, start slowly changing the world! — Anne Frank



### Pledge Card Checkbox



- PLANNED GIVING**
- I/we have made a charitable gift through our estate plan.
- I/we would like information about ways of making a planned gift from my/our estate.



# Basic

**Minute for Mission**

We met here, we were married here, our kids were baptized here. In a place where everything changes so fast, this church has been our constant, our foundation.

Thank you, our church family, for being there for us, carrying us through some of our hardest times and greatest moments. We want to be there for you too, so we wanted you to know that you are a part of our estate plans.



Legacy Sunday



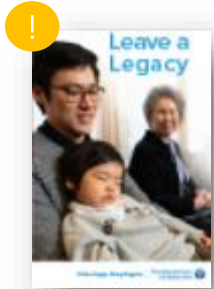
Brochure



Bulletin Insert



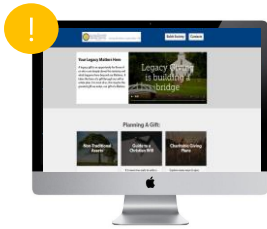
Minute for Mission



# Basic



## PG Web Pages



Summer

### Minute for Mission

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Fall

## Legacy Sunday



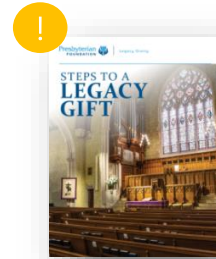
## Brochure



## Bulletin Insert



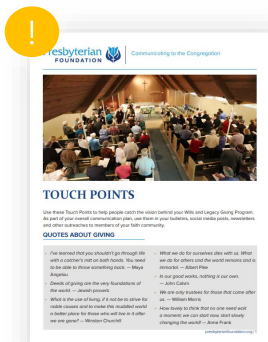
## Minute for Mission



Winter

Spring

## Blurbs Touch Points (10 min.)



## Pledge Card Checkbox



**PLANNED GIVING**

I/we have made a charitable gift through our estate plan.

I/we would like information about ways of making a planned gift from my/our estate.

LOGO **Legacy Pledge Card**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**PLANNED GIVING**  
 I/we have made a charitable gift through our estate plan.

**If acknowledging:**  
 For all that God has given (Lasts when you're no longer here)  
 But remains to care for the needy, still another generation, that may help the following church:

**Pledge History** Increase over 2010

2010	\$0.00	100%	\$0.00
2011	\$0.00	100%	\$0.00

**My/Our Pledge**

\$ \_\_\_\_\_ (Minimum of \$100)

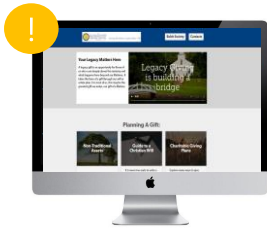
pledge center at 800.370.6728



Basic

Intermediate

PG Web Pages



Summer

Minute for Mission



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Fall



Legacy Sunday



Brochure



Bulletin Insert



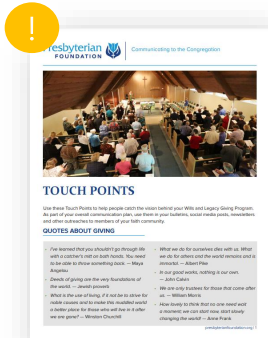
Minute for Mission



Winter

Spring

Blurbs Touch Points (10 min.)



Pledge Card Checkbox



**PLANNED GIVING**

I/we have made a charitable gift through our estate plan.

I/we would like information about ways of making a planned gift from my/our estate.

LOGO **Legacy Pledge Card**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

PLANNED GIVING: Charitable gifts made through our estate plan.

**If Remembering**

For all that God has given (Loving Memory of the donor's legacy), we request you make the pledge. All pledges remembered, but we will be following you!

Pledge History	Income over 2010
2010: \$0.00	1%: \$0.00
2011: \$0.00	10%: \$0.00

**My/Our Pledge**

\$ \_\_\_\_\_

pledge center at 919.276.4222

Basic

Legacy Sunday

Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article

Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)



Intermediate



Seasonal  
Letter/  
Article/  
Video



Ask

Follow-Up

Impact

Legacy

Basic

Intermediate

Legacy Sunday

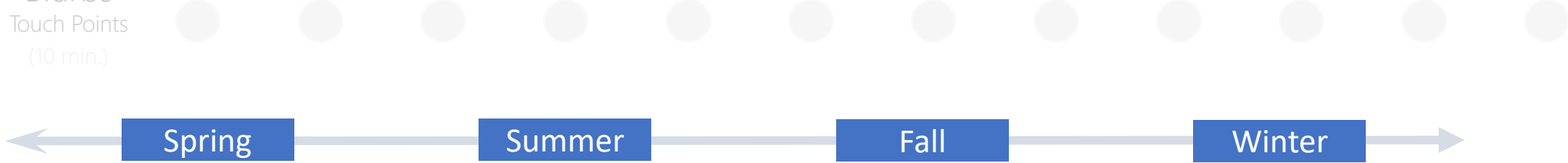
Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article

Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)



Letter  
Invitation  
Or the ASK



Basic

Intermediate

Legacy Sunday

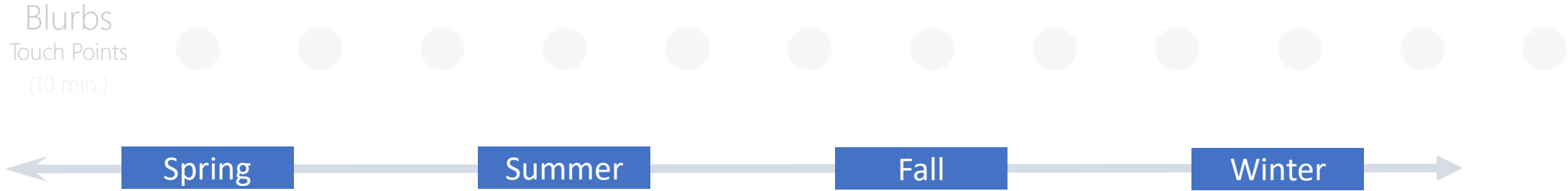
Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article

Invitation

Pledge Card Checkbox

E



PG  
Conversations  
+++



Basic

Legacy Sunday  
Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article  
Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)



Intermediate



Event  
Seminar

Basic

Intermediate

Legacy Sunday

Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article  
Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)



Seasonal  
Letter/  
Article/  
Video

Letter  
Invitation

PG  
Conversations

Event  
Seminar

Basic

Legacy Sunday

Letter / Article

Brochure  
Bulletin Insert  
Minute for Mission

Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)



Intermediate

Seasonal Letter/  
Article

PG Web  
Pages

Event  
Seminar

Letter  
/ Ask

PG  
Conversations



Advanced



Event:  
Discerning  
Legacy

Basic

Intermediate

Advanced



Legacy Sunday

Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article

Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)



Seasonal Letter/  
Article

PG Web  
Pages

Event  
Seminar

Letter  
/ Ask

PG  
Conversations



Session  
And Staff  
Briefing



Basic

Legacy Sunday

Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article

Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)



Seasonal Letter/  
Article

PG Web  
Pages

Event  
Seminar

Letter  
/ Ask

PG  
Conversations



Donor  
Stories



Intermediate

Advanced



Basic

Legacy Sunday

Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article  
Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)



Intermediate

Seasonal Letter/  
Article

PG Web  
Pages

Event  
Seminar

Letter  
/ Ask

PG  
Conversations



Advanced



Gratitude



Basic

Intermediate

Advanced



Legacy Sunday

Brochure  
Bulletin Insert  
Minute for Mission

Blurbs  
Touch Points  
(10 min.)

Seasonal Letter/  
Article

PG Web  
Pages

Event  
Seminar

Spring

Summer

Letter / Article

Invitation

Pledge Card Checkbox

**Endowment Report 2022**

Mission Or Vision Statement

**Intro Letter or Mission Statement**

An intro letter might highlight from the previous year, such as: list the recipient areas of distributions, identify a few impact areas that made a great difference.

Supporting information is also helpful for transparency and to demonstrate gratitude, such as: Investment performance of the funds, the amount distributed to vision and mission, planned gifts that came in and new planned gifts that we've been informed of.

Close with gratitude and invitation to those who might consider gifts to the endowment.

**GENERAL FUND: \$18,000**  
Describe how the endowment supported the mission and vision during the report period. Name specific accomplishments where possible. Try to avoid the perception that endowment can cover general operations.

**SUPPORT FUND: \$18,000**  
Describe how the endowment supported the beneficiaries during the report period. Name specific accomplishments where possible. Try to avoid the perception that endowment can cover general operations.

**PROGRAM FUND: \$18,000**  
Describe how the endowment supported the organization during the report period. Name specific accomplishments where possible. Try to avoid the perception that endowment can cover general operations.

**CAPITAL FUND: \$18,000**  
Describe how the endowment supported the organization during the report period. Name specific accomplishments where possible. Try to avoid the perception that endowment can cover general operations.

**THANK YOU** to all of those who made this possible through your generous giving!

**PLANNED GIVING** If you would like to consider how you too can make your legacy matter here through the endowment, consider a planned gift through your will or estate!

Endowment  
Annual  
Report  
&  
Impact  
Video

Basic

Intermediate

Advanced



Legacy Sunday

Brochure  
Bulletin Insert  
Minute for Mission

Letter / Article

Invitation

Pledge Card Checkbox

Blurbs  
Touch Points  
(10 min.)

Seasonal Letter/  
Article

PG Web  
Pages

Event  
Seminar

Letter  
/ Ask

PG  
Conversations

Spring

Summer

Fall

Winter

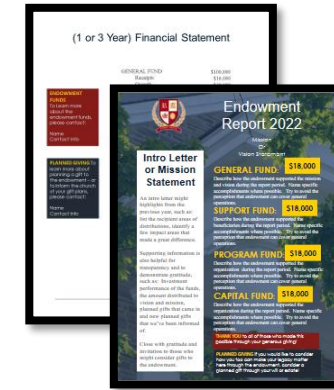
Event  
Discerning  
Legacy

Legacy Circle  
Event /  
Dinner

Donor  
Stories



Gratitude



Endowment  
Annual  
Report/  
Video

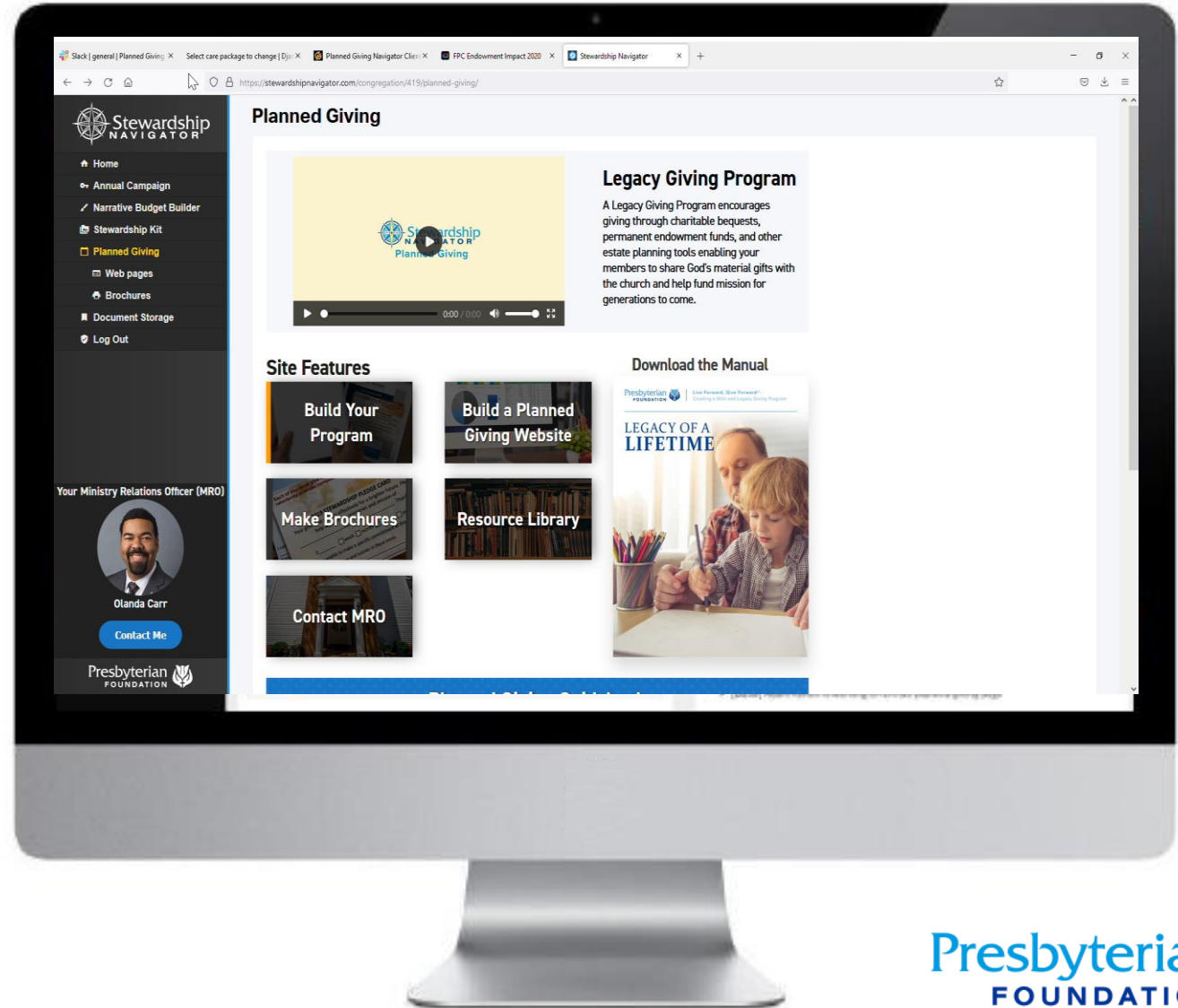
3

RESOURCES



# COMMUNICATE Your Program

Here's where to go...



# EXPAND

## Your Program

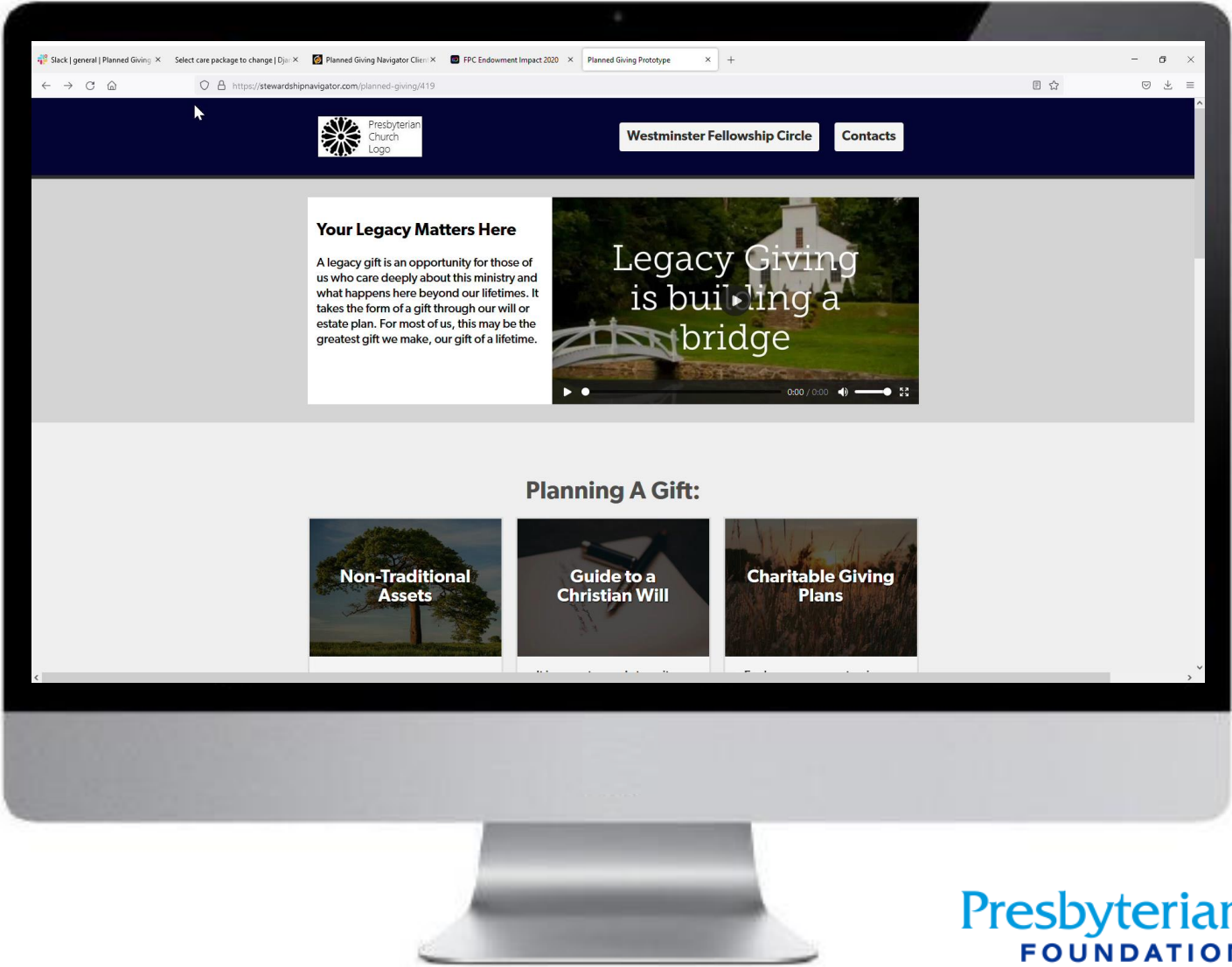
Planned Giving Web Pages 

Brochures 

Resources 

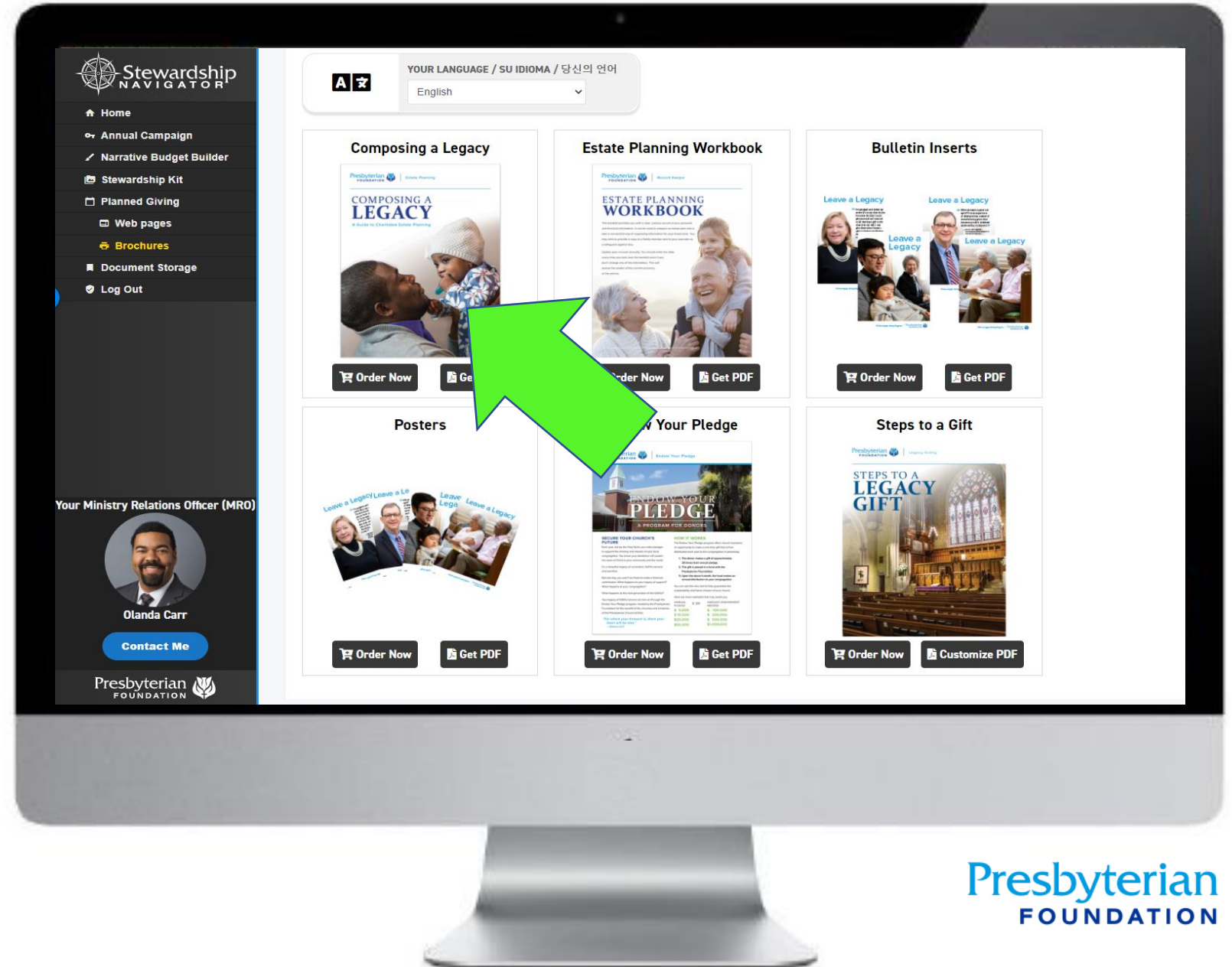
Someone There to Help 

# Planned Giving Pages...





Brochures...



# COMPOSING A LEGACY

A Guide to Charitable Estate Planning



## A CHRISTIAN APPROACH

Estate planning offers Presbyterians a unique approach to stewardship. It can leave an indelible legacy for future generations. You may be surprised that even a small asset can be used to support a mission. You may not even identify assets previously.

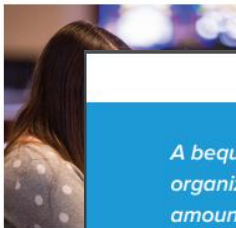
This booklet will concentrate on the basics of estate planning. Equipped with this information, you can consult with your financial and legal advisors.

## WHAT IS ESTATE PLANNING?

Estate planning is the process of making decisions for the present and future. It is a way to carry out your intentions for the protection and support of your family during your lifetime and their inheritance after your death.

A will is the cornerstone of a solid estate plan. A good will does not make an estate plan. A good estate plan includes a will, decisions regarding guardianship of your children, powers of attorney for your finances and a healthcare proxy with the authority to make decisions on your behalf, if needed. Your wishes for life support should be included in this difficult decision from loved ones.

Reducing estate and probate taxes is a goal when planning your estate, allowing you to maximize the amount



to your loved ones. Frequently, the amount of assets that are distributed to your loved ones is less than you would like.

A bequest can be valuable to your organization you support, even if the amount (after expenses) is small.

### KEY FACTORS IN ESTATE PLANNING

- Will
- Durability
- Health
- Tax
- Guardianship
- Ownership
- Living Trusts

### FORMALIZING YOUR WILL

Once you have considered how you want your assets distributed, and to whom, you should formalize your will. An attorney should do this, as legal terms are used. Employing an attorney ensures your intentions are clear and concise. This helps to avoid misunderstandings and delays. A well-drafted will ensures your will complies with the laws of your state.

A bequest can be made directly to the Foundation to establish a fund for the perpetuity to the Church or charity. Another option is to bequest to the Foundation to establish a fund which will be professionally managed and distributed to the Church or charity.

### EXECUTORS

Once you have reviewed your assets and named your beneficiaries, it is important to name an executor. The executor is the person who will see that your wishes are carried out. The executor can be a friend, relative, or a bank or trust company. An alternate executor should always be named.

2 | [presbyterianfoundation.org](http://presbyterianfoundation.org)

## YOUR ESTATE AND GIFT PLANNING TEAM



The Presbyterian Foundation has been serving the Church and individual Presbyterians in their desire to bring mission and people together for over two centuries. Our mission is to support charitable goals through the cultivation and management of gifts given by individuals, churches, governing bodies and church-related institutions.

With a skilled network of Ministry Relations Officers and support staff, as well as highly trained specialists in gift compliance, accounting, investment management, law and gift administration, we offer many valuable resources. Our services are aimed at assisting you in giving

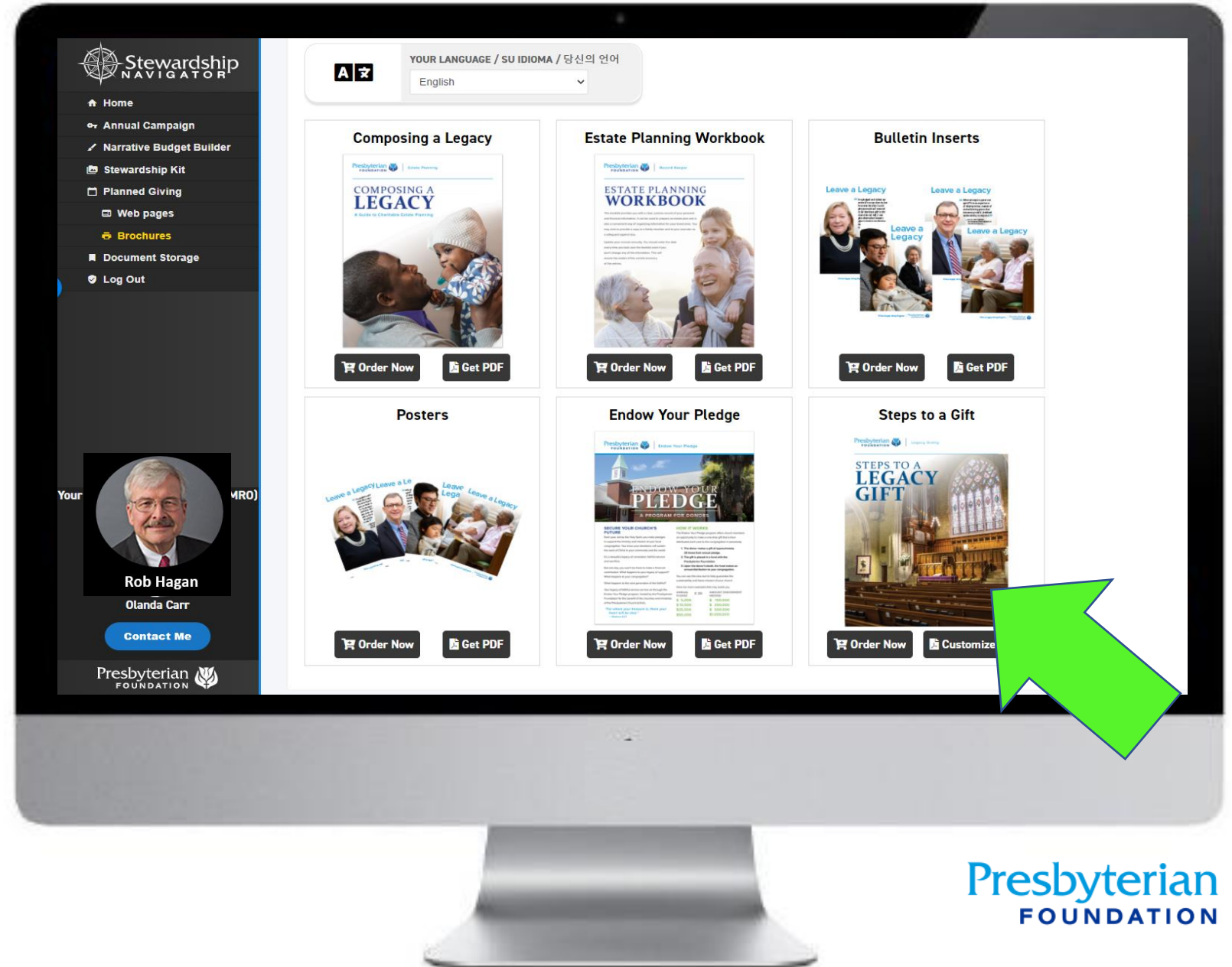
and making the most of the resources you share and invest.

Your Foundation Ministry Relations Officer has expertise in charitable giving and is always available for consultation. As with any decision regarding legal and financial matters, we recommend you consult with your own independent legal and financial professionals.

To learn more about reaching your charitable and estate planning goals, contact us at 800-858-6127 or visit [presbyterianfoundation.org](http://presbyterianfoundation.org). To reach your local Ministry Relations Officer, simply use the search feature located on the web site for contact information.

*The materials provided in this guide are examples of a general and informative nature, and do not constitute advice, legal or otherwise. Through careful estate planning, you can attain your objective for providing for loved ones as well as for Presbyterian missions and ministry. Please consult with your attorney or advisor for financial and estate planning advice before you take any action.*

Brochures...



# STEPS TO LEGACY GIFT



## STEP 1: LEARN

### WHAT PLANNED GIVING REQUIRES

As you plan your gift, please know that planned giving is a legal transaction, it is...

**Opportunity** for you who care so deeply for this mission and its ministries, even after you are gone. **The gift of a lifetime** for you who are using your financial, personal and real assets. After our lives, those assets remaining, most of us have the opportunity to give, therefore the most impactful gift of our lives.

**Leadership** for you whose generous decisions and actions teach others to re-deploy the resources they have.

**We are grateful** to those who came before us for entrusting us to ensure that it thrives in brand new ways.

## STEP 2: DESIGN YOUR GIFT

Planning your gift may enable you to send more future value for you and your family. Here are some common gifts that you might consider:

**BEQUEST:** Make a gift after your lifetime through a will. It can be a fixed dollar amount, a specific asset, or a percentage of your estate.

**RETIREMENT ACCOUNT:** IRA's, 401(k)'s and other retirement accounts can be the most heavily taxed asset in many estates. Designating the church as beneficiary might leave your less task-burdened assets to your family.

**CHARITABLE TRUST:** Trusts can combine flexibility with tax efficiency. "A charitable trust is a powerful gift to the church."

\* Caring for estates and assets often requires help from a professional. In this situation, we suggest that you consult with your professional advisor on how this gift would fit into your plans.

## STEP 3: IMPACT THE FUTURE

Our church has served as our congregation's home for worship, for fellowship and for doing ministry both here and in our community.

This was started by many who came before us, and now is our opportunity to plan for those who come next.

Making a planned gift will prepare and equip future generations to continue our vital ministry, bringing them the opportunity:

- To adapt to teach the next generations,
- To tend and care for this place as our cherished church home and
- To reach out seeking new ministry opportunities that we cannot foresee.

Through a legacy gift, you can still work here even after your lifetime. By providing for the future, you can continue to be Christ's hands in the world – through this congregation.

## STEP 4: SHARE GENEROSITY

Sharing that you've planned a legacy gift – and why – can amplify the power of your gift.

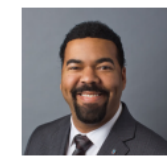
**Share the news of your gift with the church. Here are several benefits of doing so:**

- So that your gift gets to work efficiently. When the church knows of your gift, it can help you to avoid common and avoidable barriers and delays in being implemented.
- So that we may understand your wishes to ensure your future intentions are met.
- So that others may witness your joy and be inspired to explore their own.
- So that we at the church may express our heartfelt gratitude for your generosity and for lifting the future of our church.

### JOIN THE LEGACY SOCIETY

The church introduced the Legacy Society to recognize individuals or families who have designated the church as a beneficiary in their will, trust, life insurance policy or other financial plan. These generous gifts ensure a bright future for future generations.

For more information, please contact:

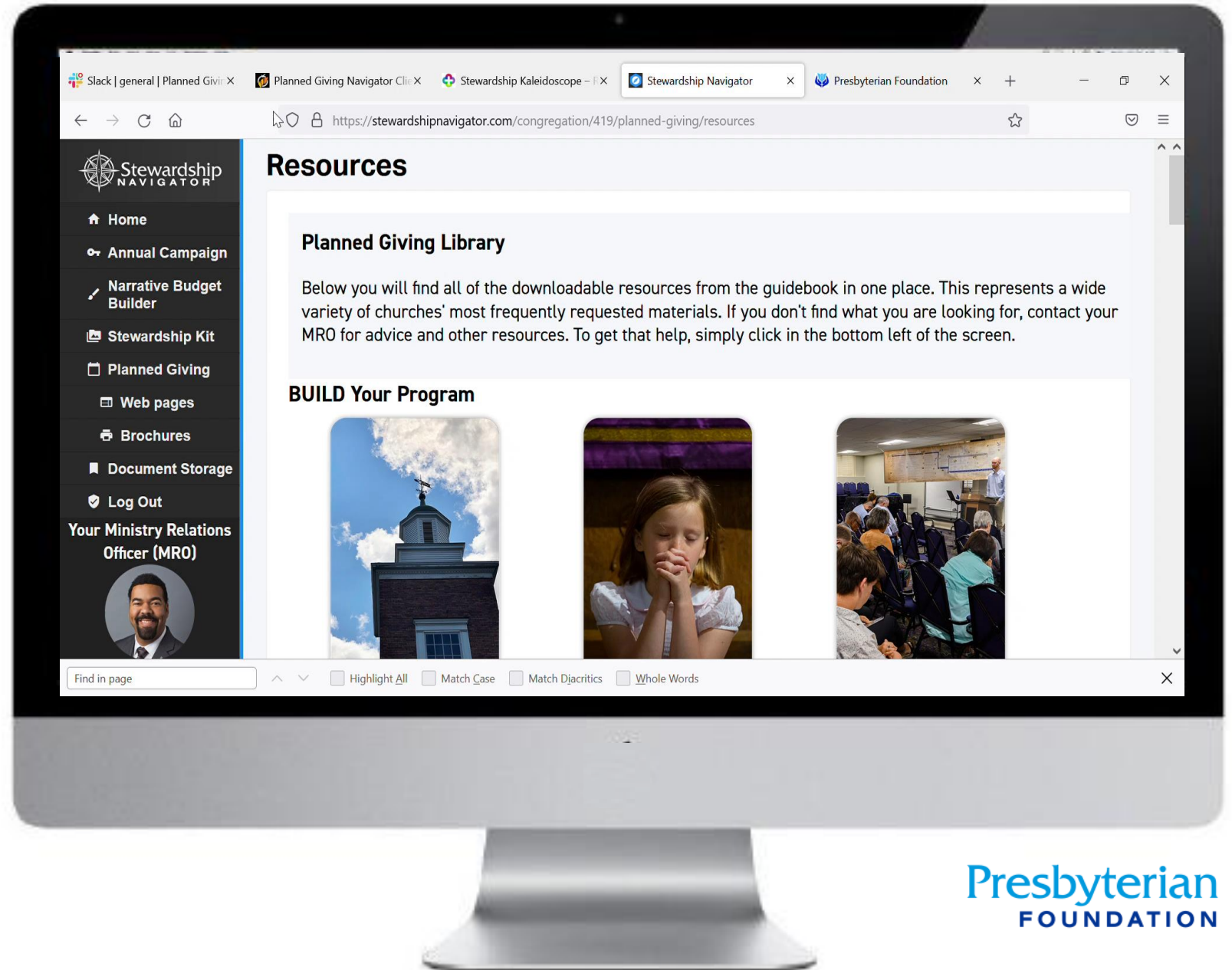


Olanda Carr  
888-711-1318  
olanda.carr@presbyterianfoundation.org



200 E 12th Street, Jeffersonville, IN 47130  
800-858-6127 [presbyterianfoundation.org](http://presbyterianfoundation.org)

# Resources...



### PROGRAM CALENDAR

- Getting
- Spring
- Summer
- Fall
- Winter

### YOUR PROGRAM PLANNER

[Print Checklist](#)

	Item	Status	Leader	Target date
GROUNDWORK	<b>Case Statement</b> Why give here? <a href="#">Read more</a>	High Priority	Optional	mm / dd / yyyy
	<b>New Task</b> Reach out to previous leadership Delete custom item	Want to Do	Optional	05 / 11 / 2023
	<b>Team</b> Who are our resources <a href="#">Read more</a>	Complete	Jamie	02 / 15 / 2023
	<b>Policies</b> A plan to receive and manage planned gifts <a href="#">Read more</a>	Not Applicable		
	<b>Charter</b> Official formation of the program <a href="#">Read more</a>	Not Applicable		

ADVANCED...





## Olanda Carr

East Region

5141 Sharon Road  
Charlotte, NC 28210

 Email Olanda

 704-379-7909

# QUESTIONS