



TALKING THE TALK:

SPEAKING TO THE GENERATIONS

Presented by:
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TPF President



Agenda:

- 1. CURRENT GIVING TRENDS**
- 2. THROUGH THE GENERATIONS**
- 3. WHAT NOW? STRATEGIC CONSIDERATIONS**

1. CURRENT GIVING TRENDS





**GIVING TRENDS
MOVING IN ALL
DIRECTIONS**

FOCUS AND CONSIDERATIONS:

It's all about this...

1. **Surviving vs. Thriving**
2. **Nurture vs. Nature**
3. **Give vs. Receive**
4. **Internal vs. External**
5. **Bank Vault vs. ATM**
6. **Monument vs. Mission**



2. THROUGH THE GENERATIONS



Who are we talking about?



GI GENERATION

- Likeliest of all to be pledgers and/or tithers
- Trained from childhood to give
- Giving is a public *responsibility*
- *Money is security*



SILENT GENERATION (MATURES)

- High level of trust and participation in institutional church
- Golden years, retirement, grandchildren, fixed income
- In many of our churches, keeping the lights on
- We must focus on estate planning

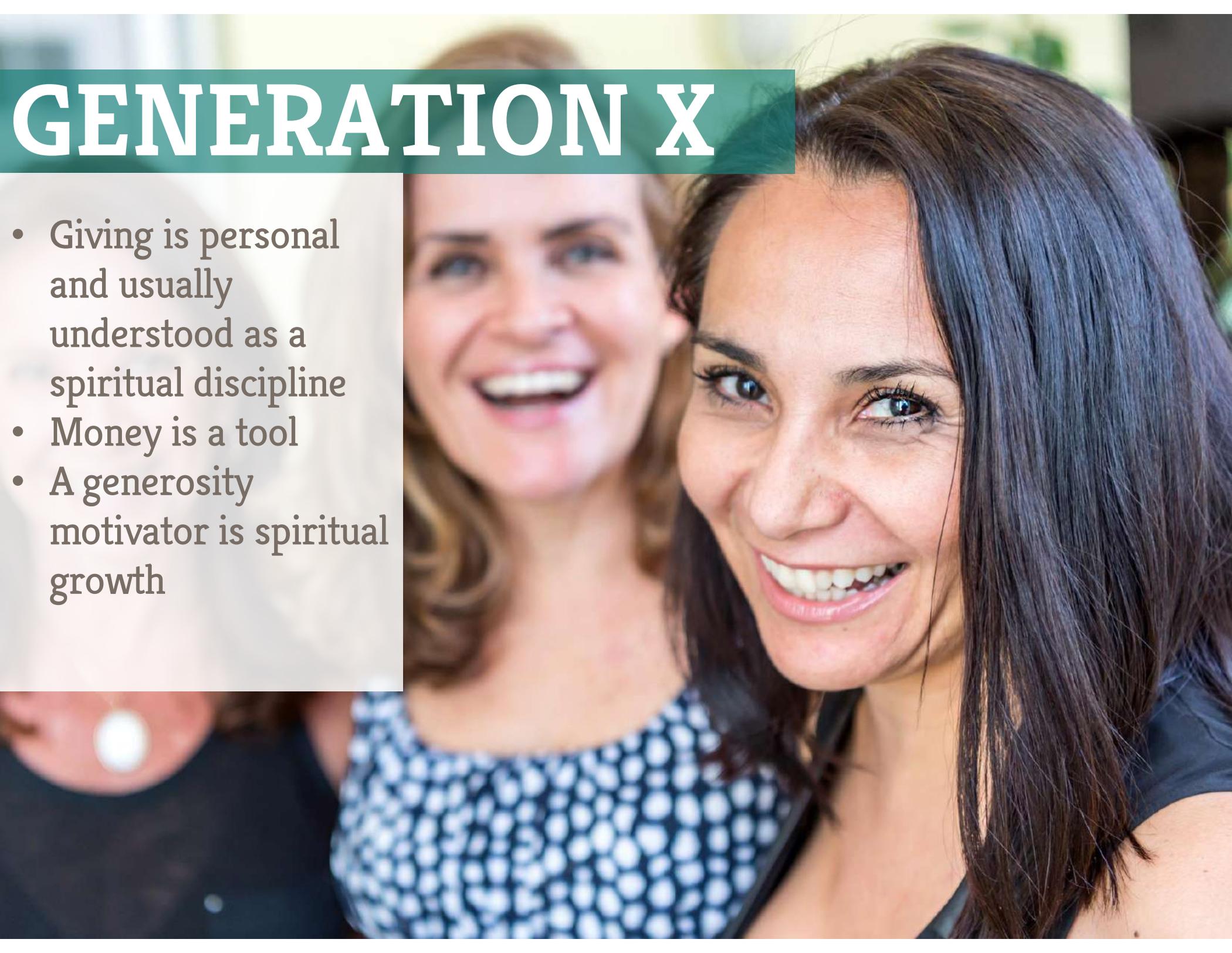


BABY BOOMERS



- Lower rates of saving, lower rates of giving than elder generations
- Less likely to pledge and/or tithe than elder generations
- Much of charitable giving comes from disposable income

GENERATION X

A close-up photograph of two women smiling. The woman in the foreground has long, dark hair and is wearing a dark top. The woman in the background has blonde hair and is wearing a blue and white polka-dot top. The background is softly blurred.

- Giving is personal and usually understood as a spiritual discipline
- Money is a tool
- A generosity motivator is spiritual growth

Millennials (GEN Y)

- Millennials are eager to support your church, but not in the same way as their parents or grandparents.
- They're less attached to religious institutions than older generations, and they don't just give out of a sense of obligation.
- For millennials, the why is more important than the what.



Homelanders (GEN Z)

- Will be the most ethnically and racially diverse generation in history (also referred to as “Plurals”)
- Frugal towards resources; green-biased
- Globally savvy and aware; world at their fingertips



3. STRATEGIC CONSIDERATIONS





YOUR TEAM IS YOUR FOUNDATION:

Generosity Champions

**Communication
Plan**

Marketing Plan

Investment Partner and Policy

Gift Acceptance Policies

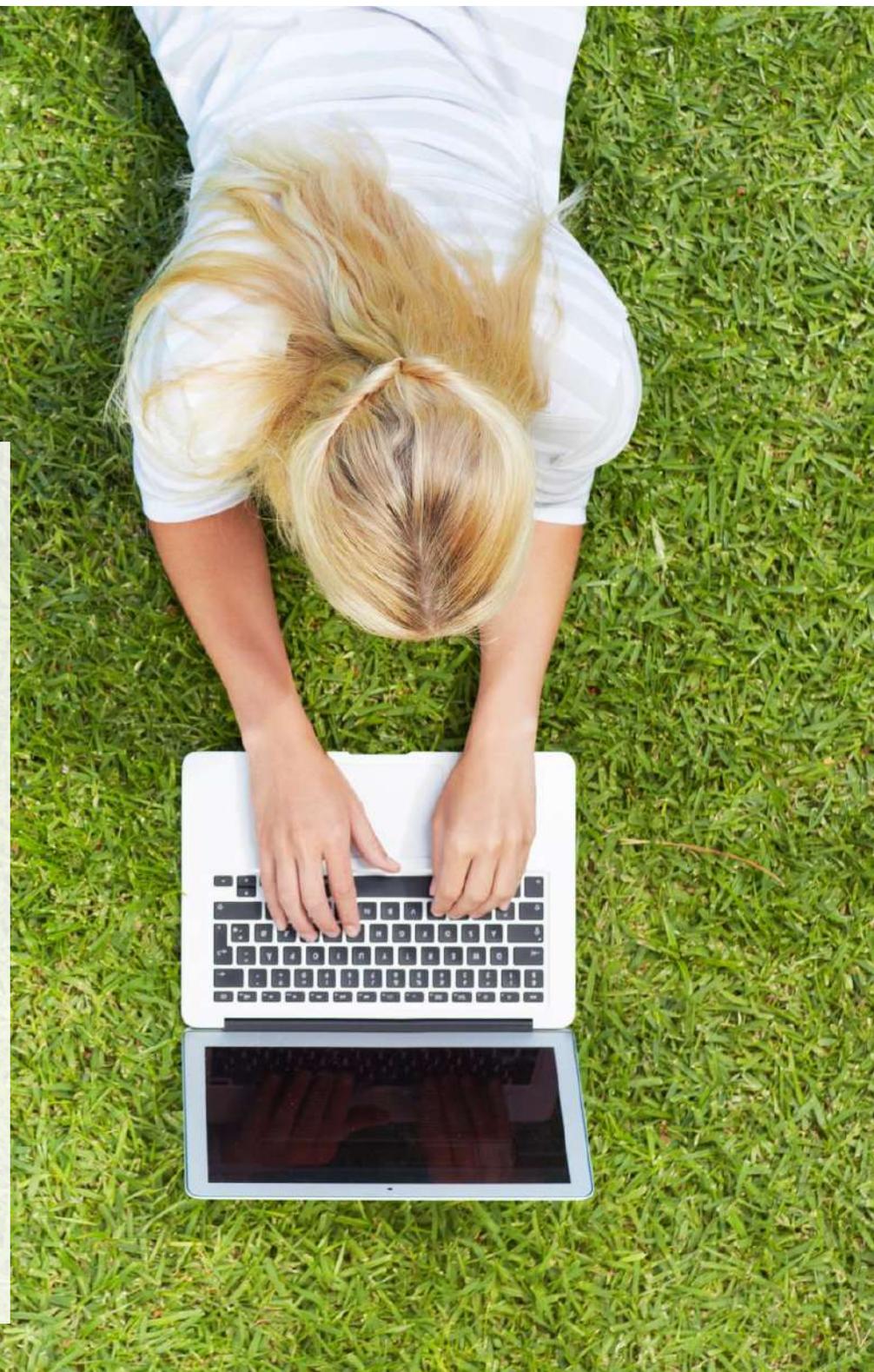
Pastor and Session Support



**But first..
A VISION
and
MISSION**

Strategic Recommendations

- Remember that people are seeking a community where they can build relationships
- Provide quality programming
- Explain how the church or organization spends and invests money in mission
- Create meaningful connections by sharing relatable stories
- Encourage mission experience
- Make it easy for all to give
- Communicate via all channels
- Offer education via financial planning and management courses



Questions to Consider:



- Does my church or organization have an inspiring vision and a strong generosity message?
- Do we offer different ways to give and is this publicized?
- Are we being transparent with our finances and mission work?
- Are we providing and encouraging mission experiences?
- Is our website current and engaging? Can you donate from our website?
- Are we scared of changing, or are we eager to adapt?
- Are we telling the stories of success in our mission/vision?
- Are we saying thank you?



TPF Educational Resources

Interactive Webinars

TPF provides a wide variety of interactive webinars that are available to our partners on demand at anytime. These electronic learning solutions provide valuable information on a variety of topics ranging from market news to growing your legacy giving program.



TPF Legacy Builder

View the 6 easy-to-understand legacy building blocks at our TPF Legacy Builder Website. Each block offers invaluable insight and helpful tips, along with additional downloads and resources.

The Bottom Line Blog Posts

Visit TPF's blog at www.tpf.org for exciting news and information. Designed to be a valuable tool for our partners, this blog discusses everything from the latest in the financial markets to key communications strategies.



TPF Experts

Our people are our best resource! And we are here for you. Our TPF Relationship Managers are experts at working with others to create meaningful legacies. Schedule a meeting with our TPF team today!



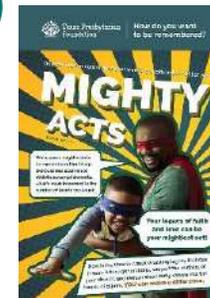
Legacy Brochures

TPF provides numerous print resources designed to help you educate your donors and church members about their legacy options. You can order yours free of charge today at www.tpf.org.



Bulletin Inserts

TPF also creates and distributes various bulletin inserts specifically designed to inspire generosity and support the creation of impactful and lasting legacies. You can also order these free of charge at www.tpf.org.





TPF'S LEGACY BUILDER IS HERE FOR YOU!



Have you seen our TPF Legacy Builder Website?

- It's smart, and it's free.
- We built it for everyone.
- Everything you need, all in one place.
- You can choose your own adventure.
- It's full of helpful tips and tricks.
- Every page connects us with you.





Enabling and Expanding
Mission, *Together.*

We are a **non-profit financial services firm** that exists to help others enable and expand mission.

What can we do for you?

TPF offers:

- Competitive investment products at a low price
- Permanent funds development and education
- Carefully crafted legacy giving solutions

VISIT [TPF.ORG](https://www.tpf.org) TO LEARN MORE

This is how one
should regard us,
as servants of
Christ and
stewards of the
mysteries of
God.”

I Corinthians 4:1



**QUESTIONS
AND
DISCUSSION**



**THANK
YOU!**

I'm here for YOU!

For questions or more information, please reach out to me.

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