

Planned Giving 101

The Basics



Agenda

1

OVERVIEW

Expectations
& Capacity



2

COMMUNICATE

Inviting members
to the opportunity



3

RESOURCES

Demo



Accessing your kit:
StewardshipNavigator.org

1

PLANNED GIVING OVERVIEW

What is planned giving?



WHAT IS IT?

To me the
donor

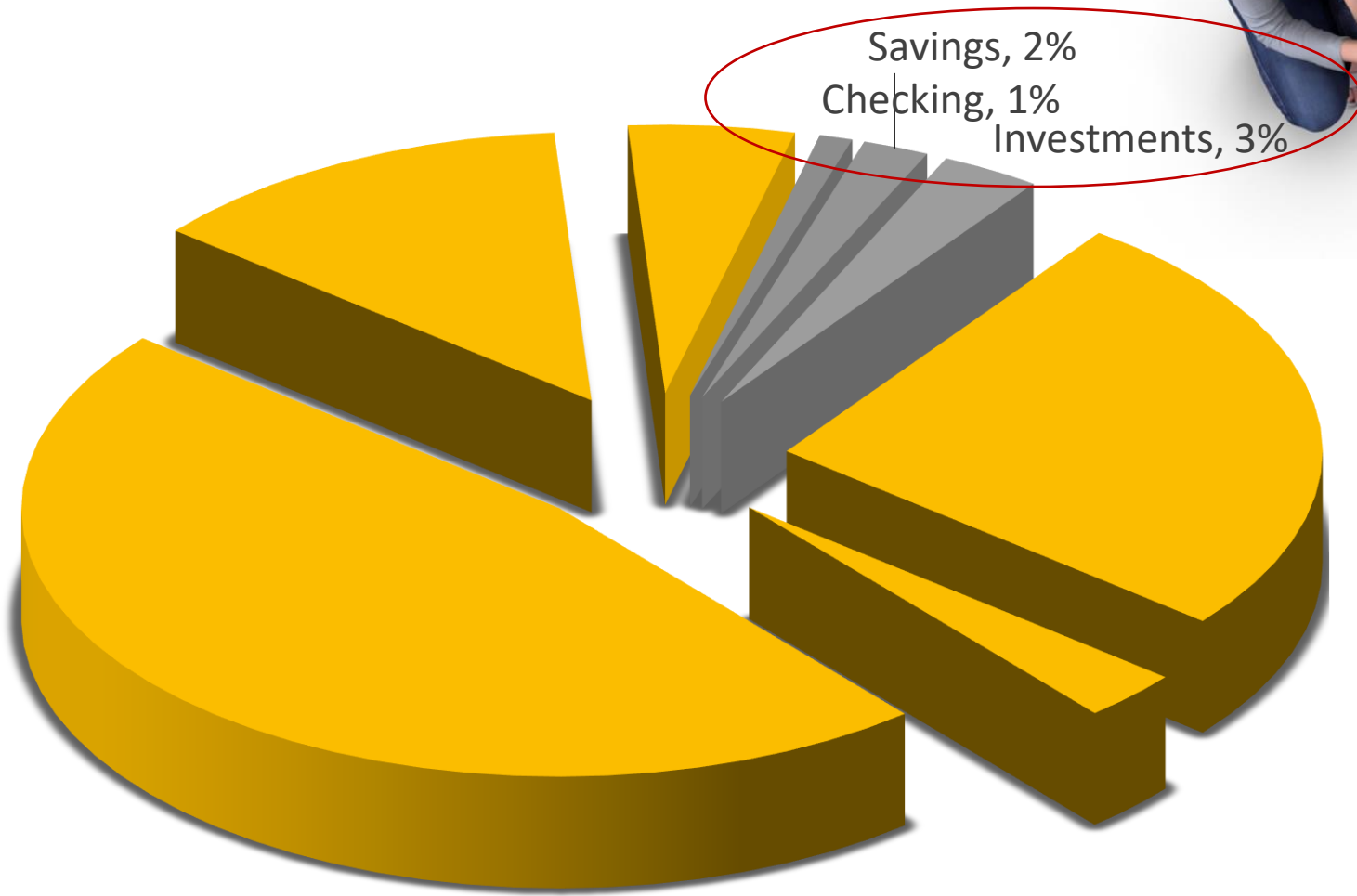
it is the

greatest gift

I will ever
make.

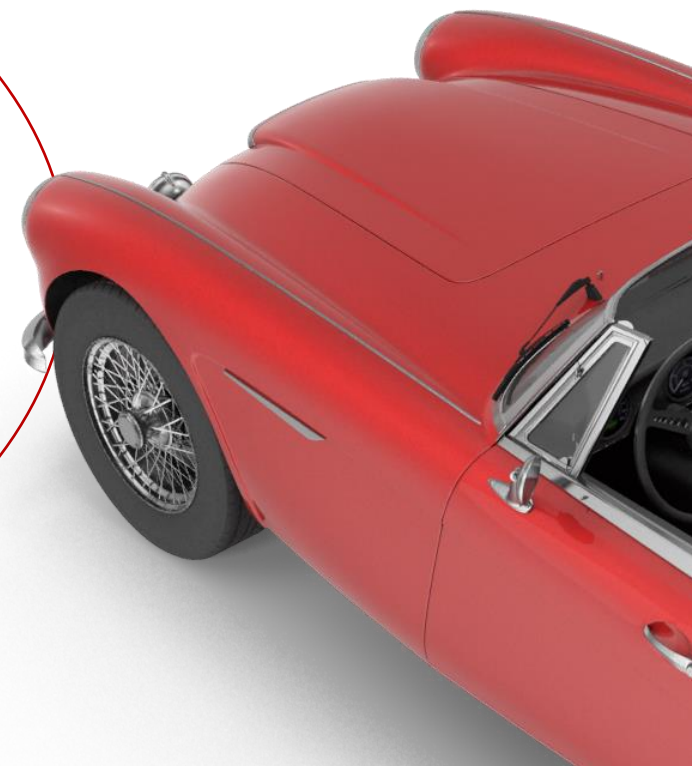
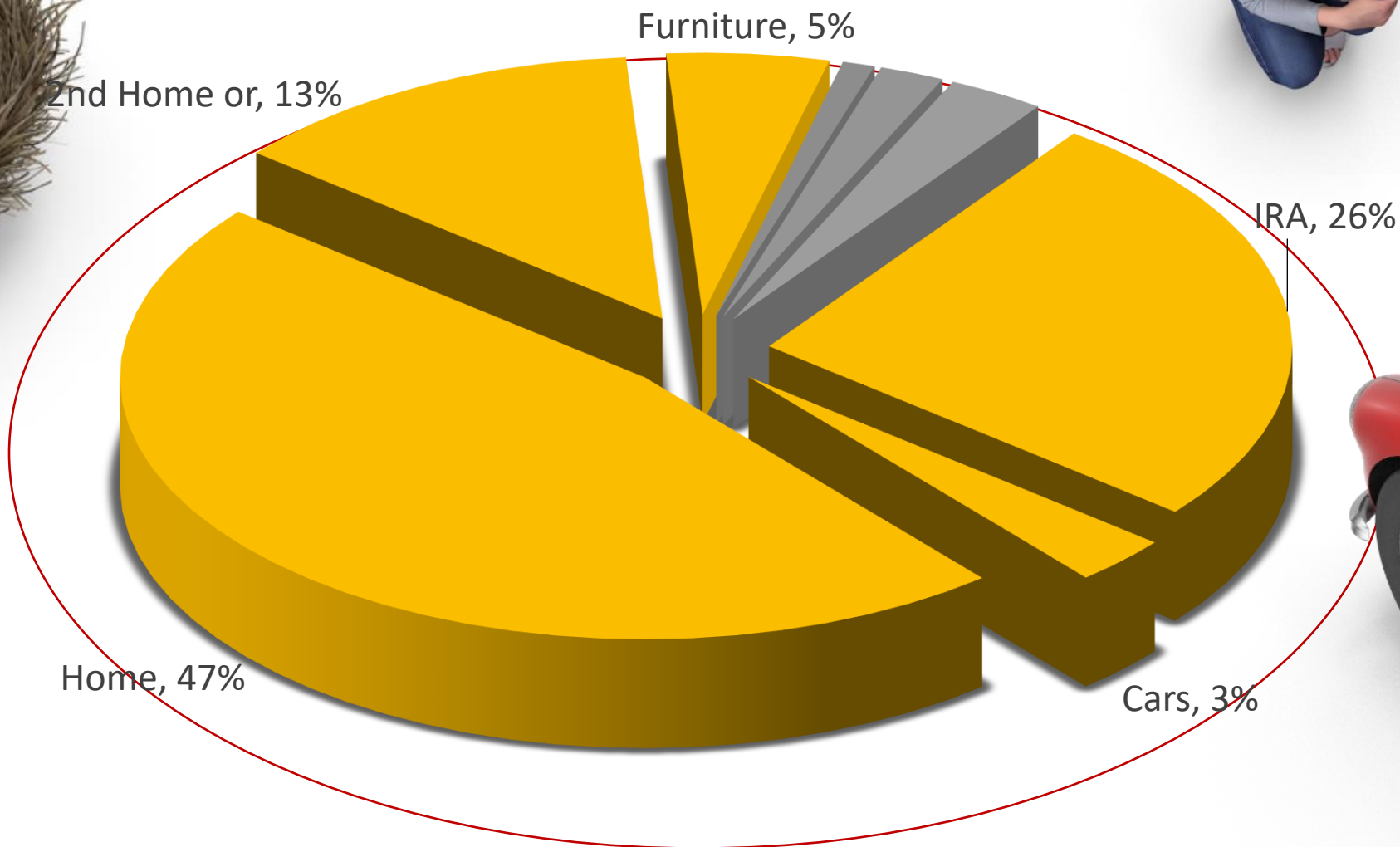
PLANNED A GIFT

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

\$42,680,000,000

163,430 Feet



How big is
\$42.68 Billion

Relative Size

PLANNED GIVING

ANNUAL
GIVING
(lifetime)

2.74X

Lifetime annual giving

How much does a Presbyterian church receive?

- a.) \$0
- b.) \$11,000
- c.) \$23,000
- d.) \$60,000

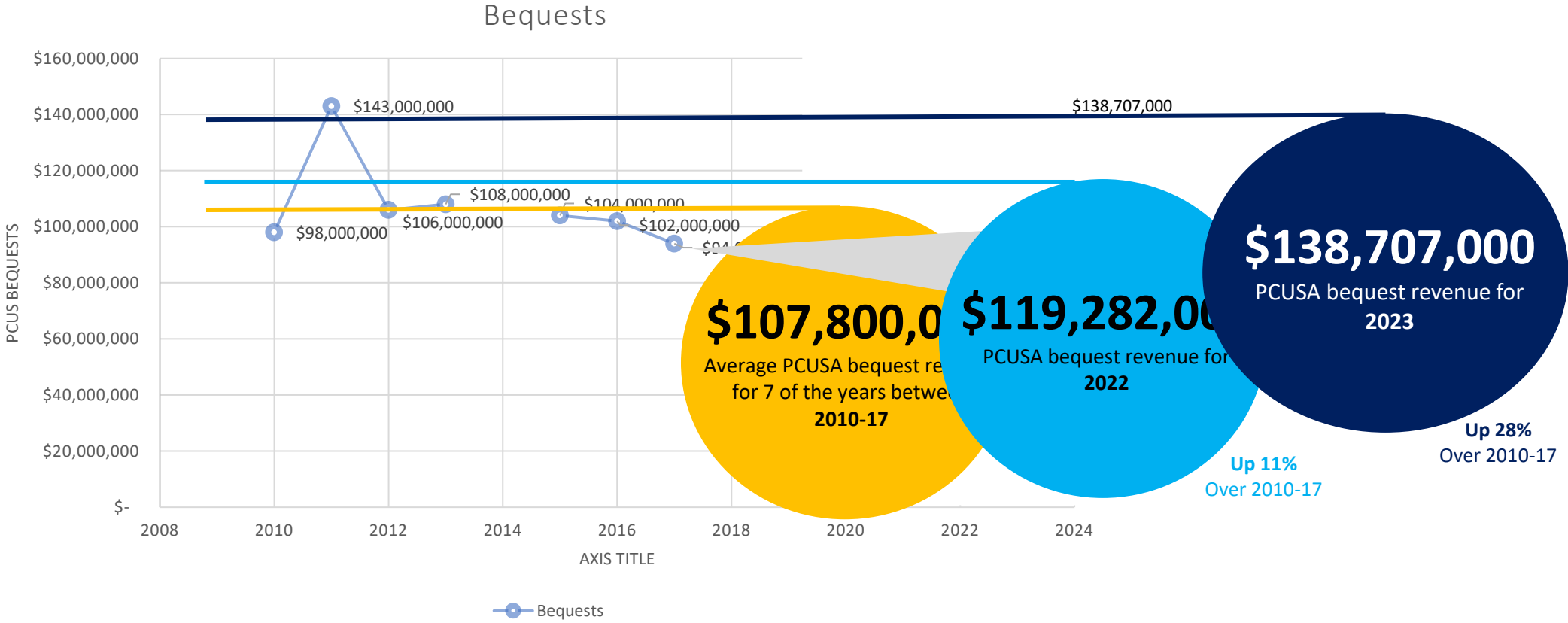
QUIZ

How much does a Presbyterian church receive?

- a.) \$0
- b.) \$11,000
- c.) \$23,000
- d.) \$60,000

QUIZ

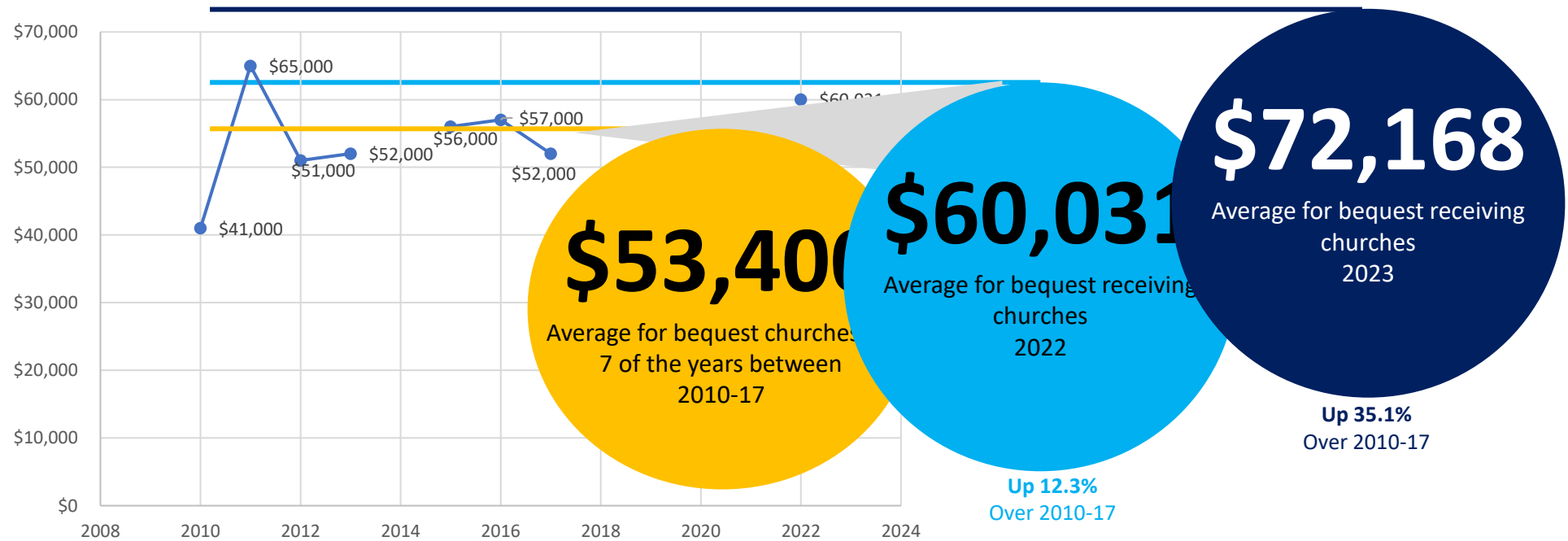
Total PCUSA Bequest Revenue



Average Bequest Revenue for bequest-receiving-churches

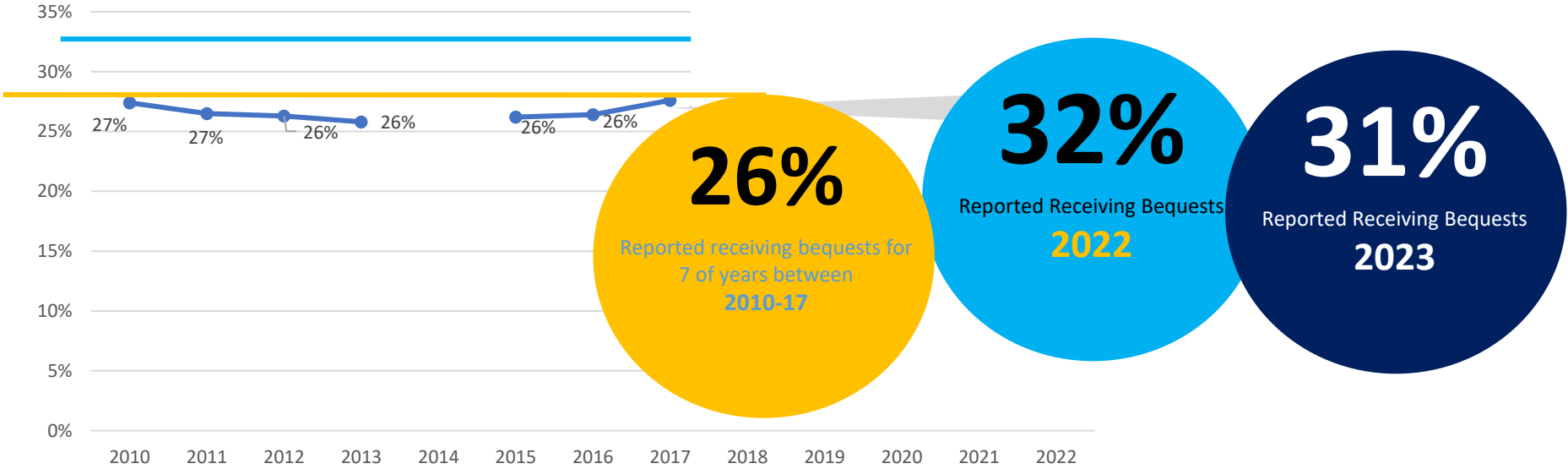
An increase of 12.3%

Over the average for 7 of the years between 2010-2017).



% of Churches Reported Receiving Bequests

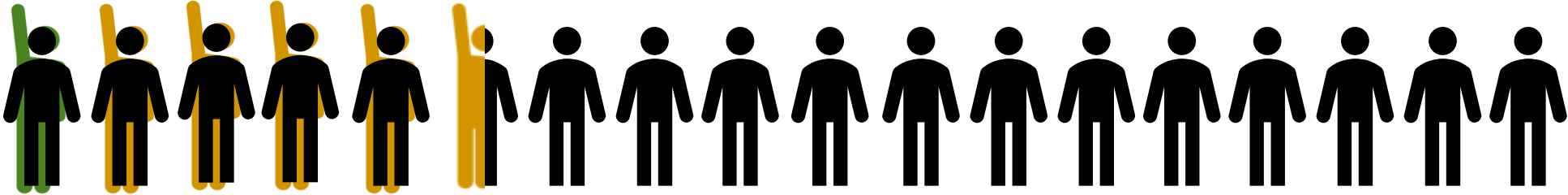
An increase of 23%
Over the average for 7 of the years between 2010-2017).



**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

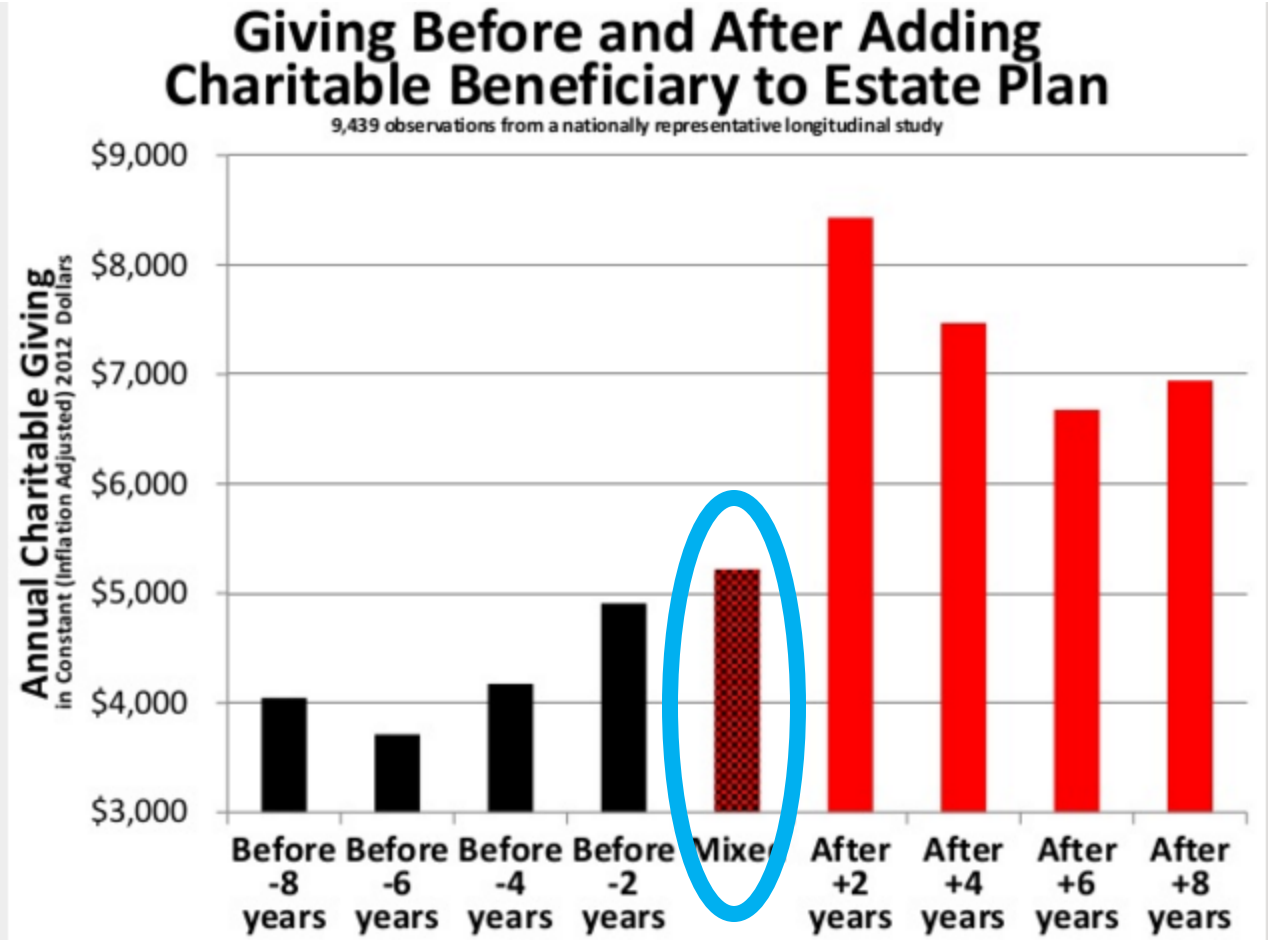
Years Old

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

**Does planned giving
hurt annual giving?**



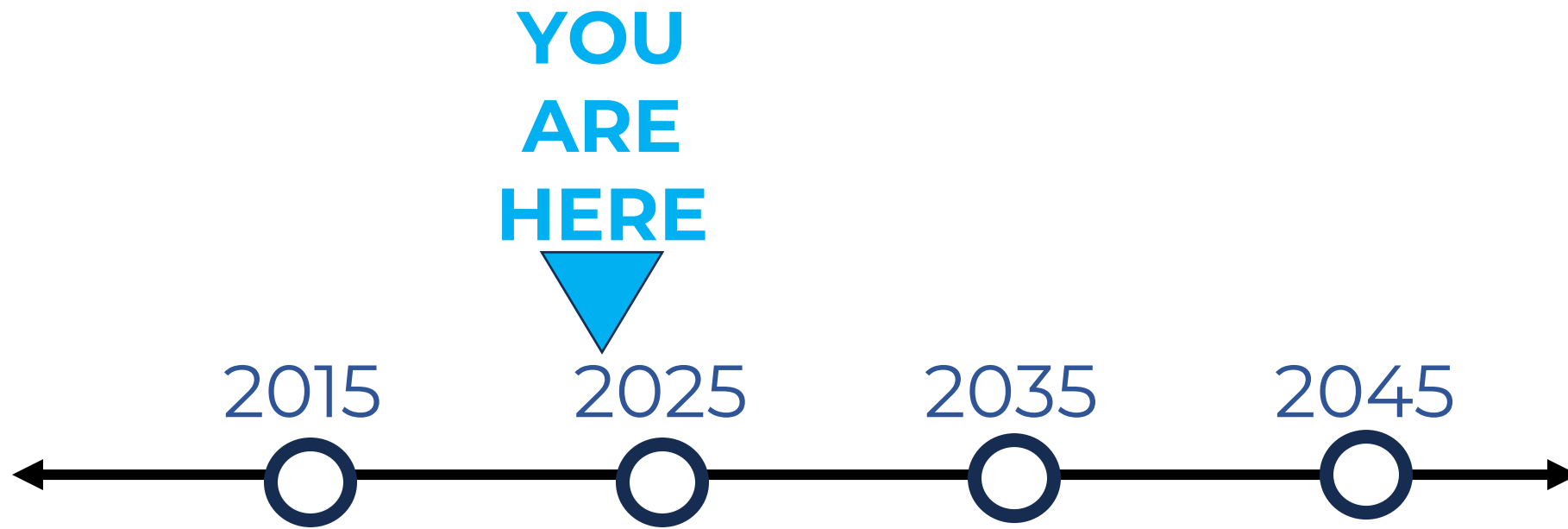
Planned Giving



Data from presentations by Russell James, Texas Tech University

Will the “Great Wealth Transfer” matter to giving?





The Great Wealth Transfer

What is big?

\$1,000,000

\$10,000,000

\$100,000,000

\$1,000,000,000

\$1,000,000,000,000

\$90,000,000,000,000

Any going to charity?

\$12,000,000,000,000

How is that **different** from now?

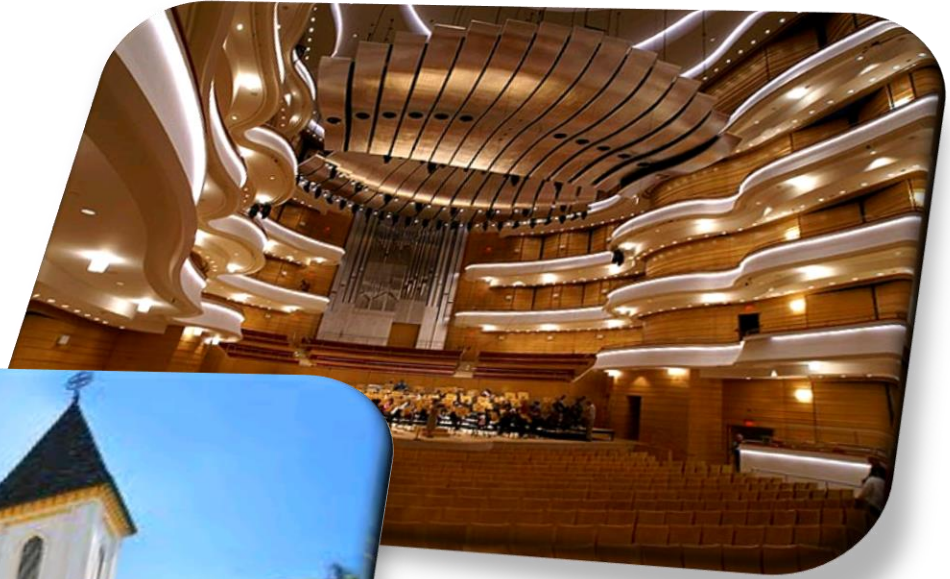
Gifts from
Wealth
Over 20 yrs

\$12,000,000,000,000

Planned Gifts
In 2023

\$45,600,000,000

CHALLENGE



CONTEXT

(1) Increasing Competition

for Charitable Dollars

(2) Our tactics have not changed

from when there was no competition
and when we were younger and
simpler

LARGE NON-PROFIT

Staff

- Dozens. Even 100+
- Full Time
- Professional (CFRE)
- Goals (Contacts and \$)
- Support: Marketing & Admin

Large Budget

CHURCH

Staff

- No staff
- Volunteer
- Minimal e
- None
- None



Budget = small

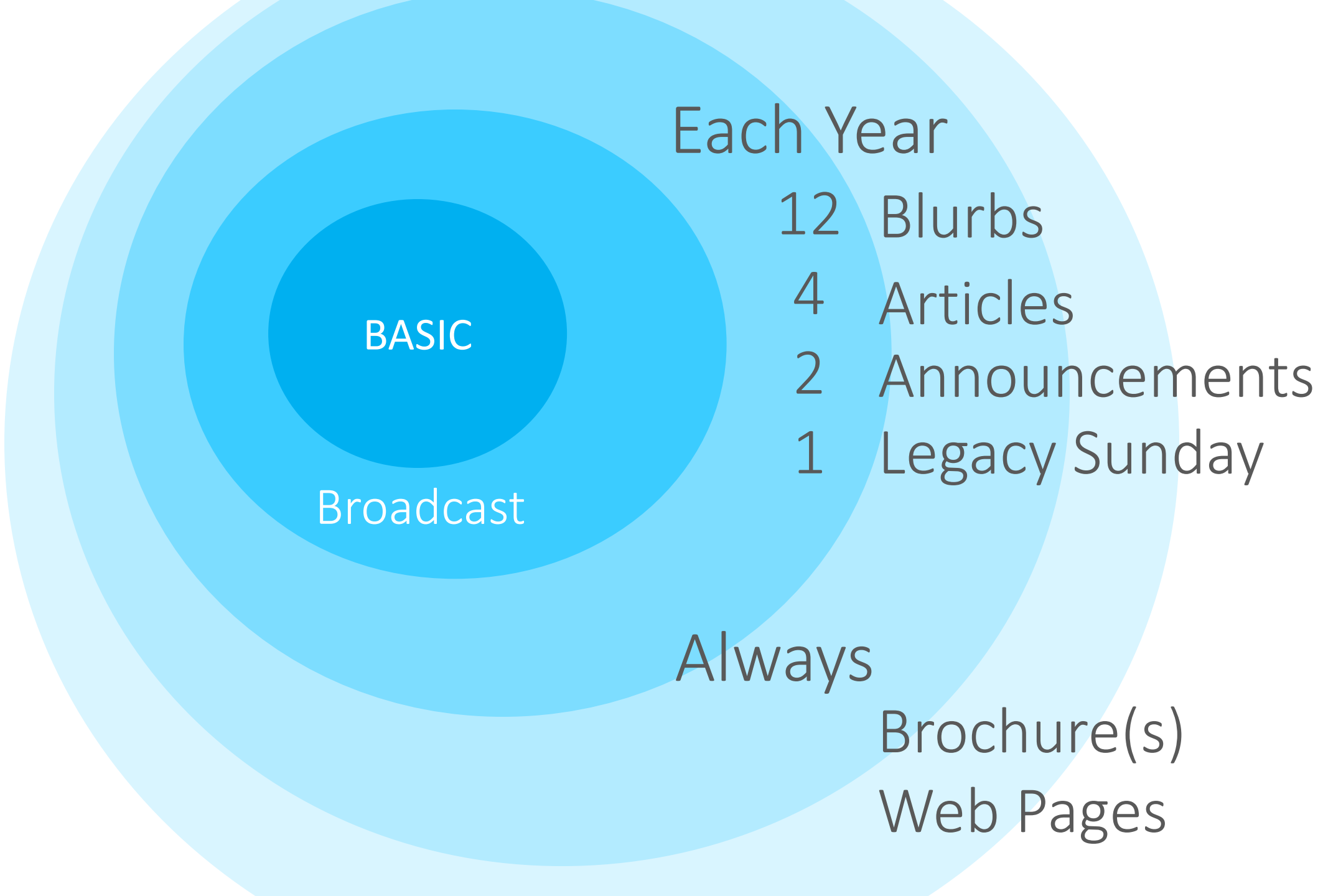
COMPETITIVE ADVANTAGE:

Having our audience
meet within our walls
every week.

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

BASIC PROGRAM



BASIC

Legacy Sunday

Announcements

Blurbs

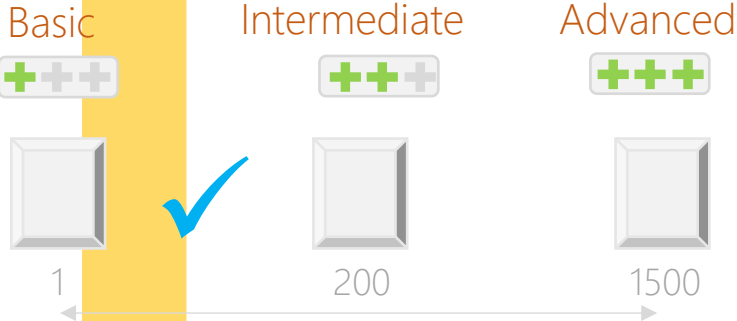
Articles

Brochure(s)

Web Pages



Membership



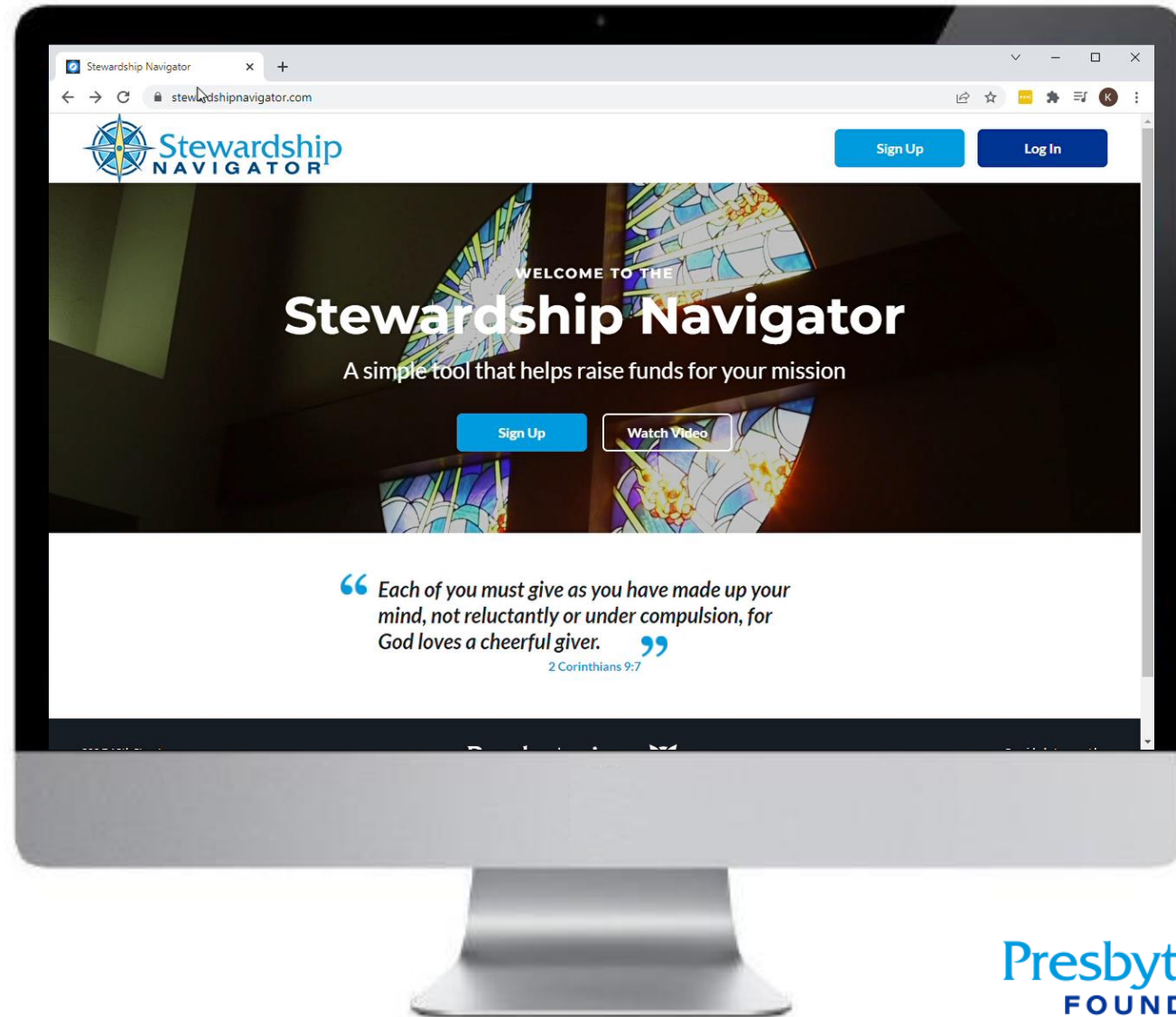
Team Members



Hours/Month

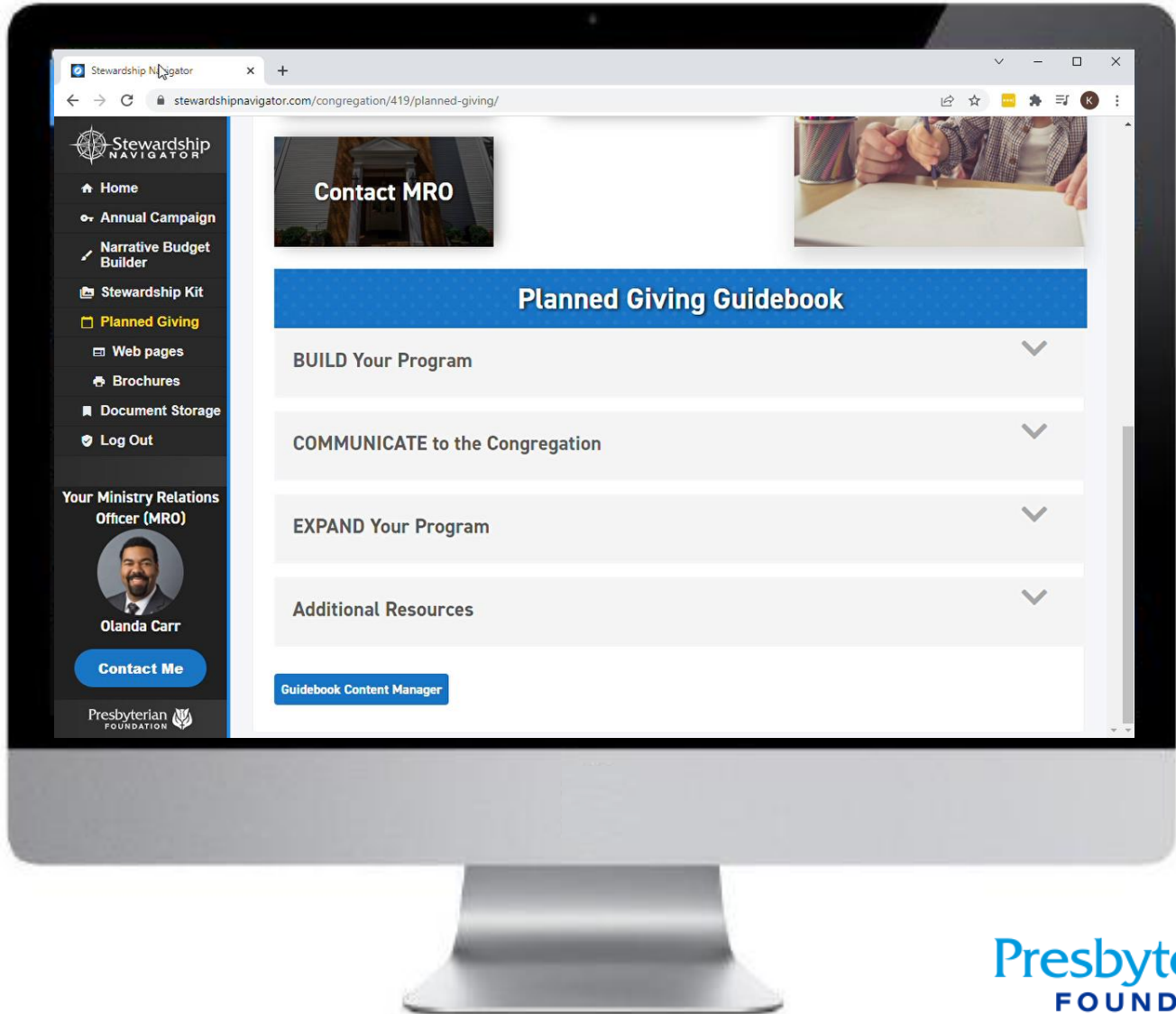


Accessing Your Kit



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

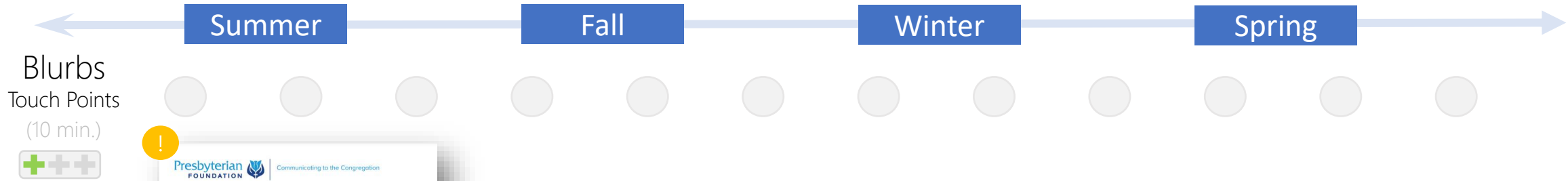



PG Web Pages




“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

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.

Fall

Legacy Sunday



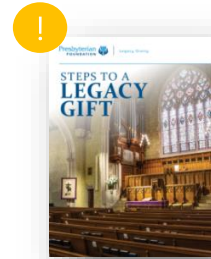
Brochure



Bulletin Insert



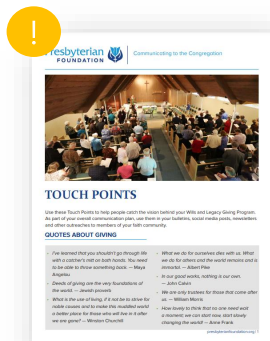
Minute for Mission



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 **Level Pledge Card**

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Email: _____

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

If Remembering
 For all that God has given us, we thank you for the gift of the Presbyterian Foundation. We would like to make a pledge. Will you please acknowledge this gift to the Presbyterian Foundation?

Pledge History

2019	\$1,000	10%	\$100.00
2018	\$1,000	10%	\$100.00
My/Our Pledge			
\$			

pledge center at 800.370.6728

Basic

Intermediate

PG Web Pages



Summer

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.

Fall



Legacy Sunday



Brochure



Bulletin Insert



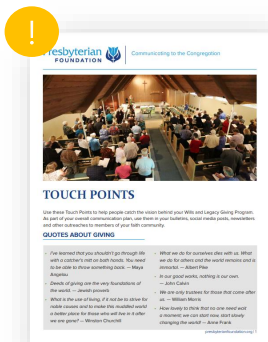
Minute for Mission



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 (Leviticus 27:30-32)
 We promise to make the pledge, with regular maintenance, for the full amount of the following pledge:

Pledge History	Increase over 2010
2010: \$0.00	10% \$0.00
2011: \$0.00	10% \$0.00

My/Our Pledge
 \$ _____ Starting in Spring 2012

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

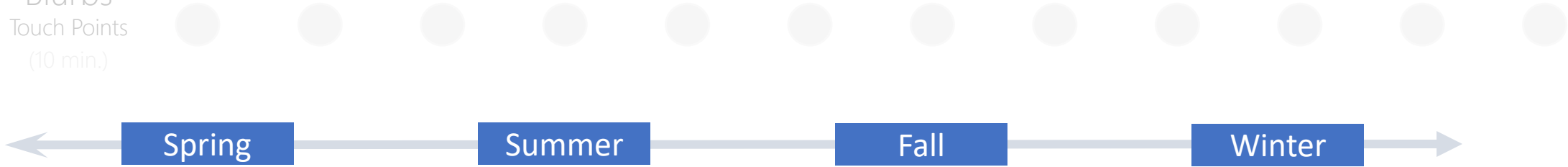
Brochure
Bulletin Insert
Minute for Mission

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

Letter / Article

Invitation

Brochure
Bulletin Insert
Minute for Mission

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

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



Event:
Discerning
Legacy

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



Session
And Staff
Briefing

Advanced



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.)



Seasonal Letter/
Article

PG Web
Pages

Event
Seminar

Letter
/ Ask

PG
Conversations



Gratitude

Advanced



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

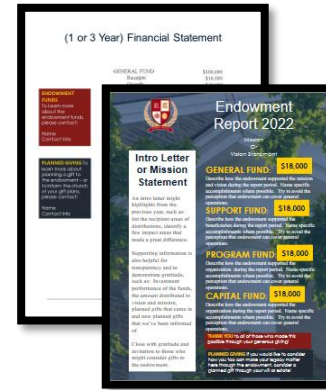
Donor
Stories



Gratitude



(1 or 3 Year) Financial Statement



Endowment
Annual
Report/
Video

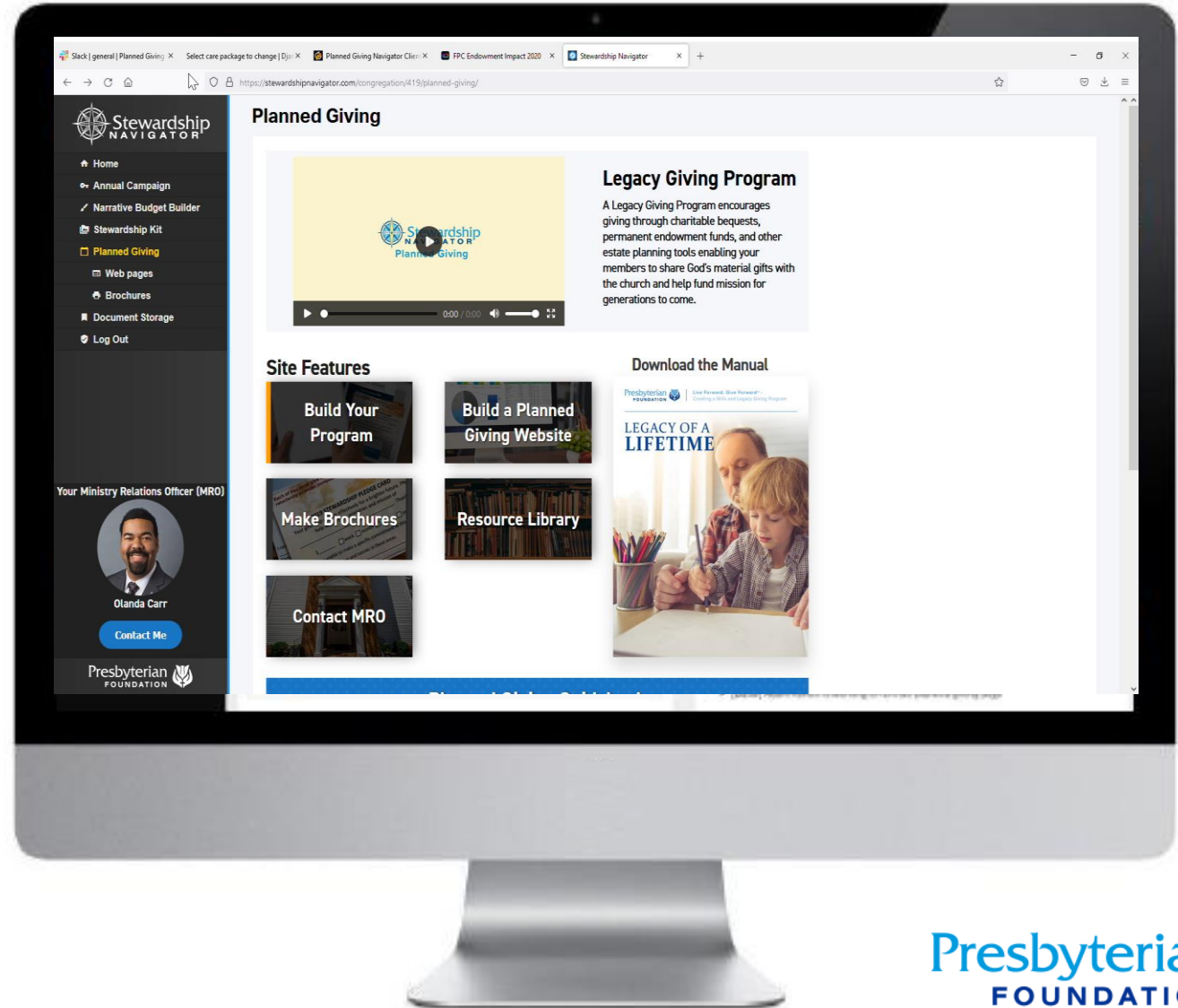
3

RESOURCES



COMMUNICATE Your Program

Here's where to go...



EXPAND

Your Program

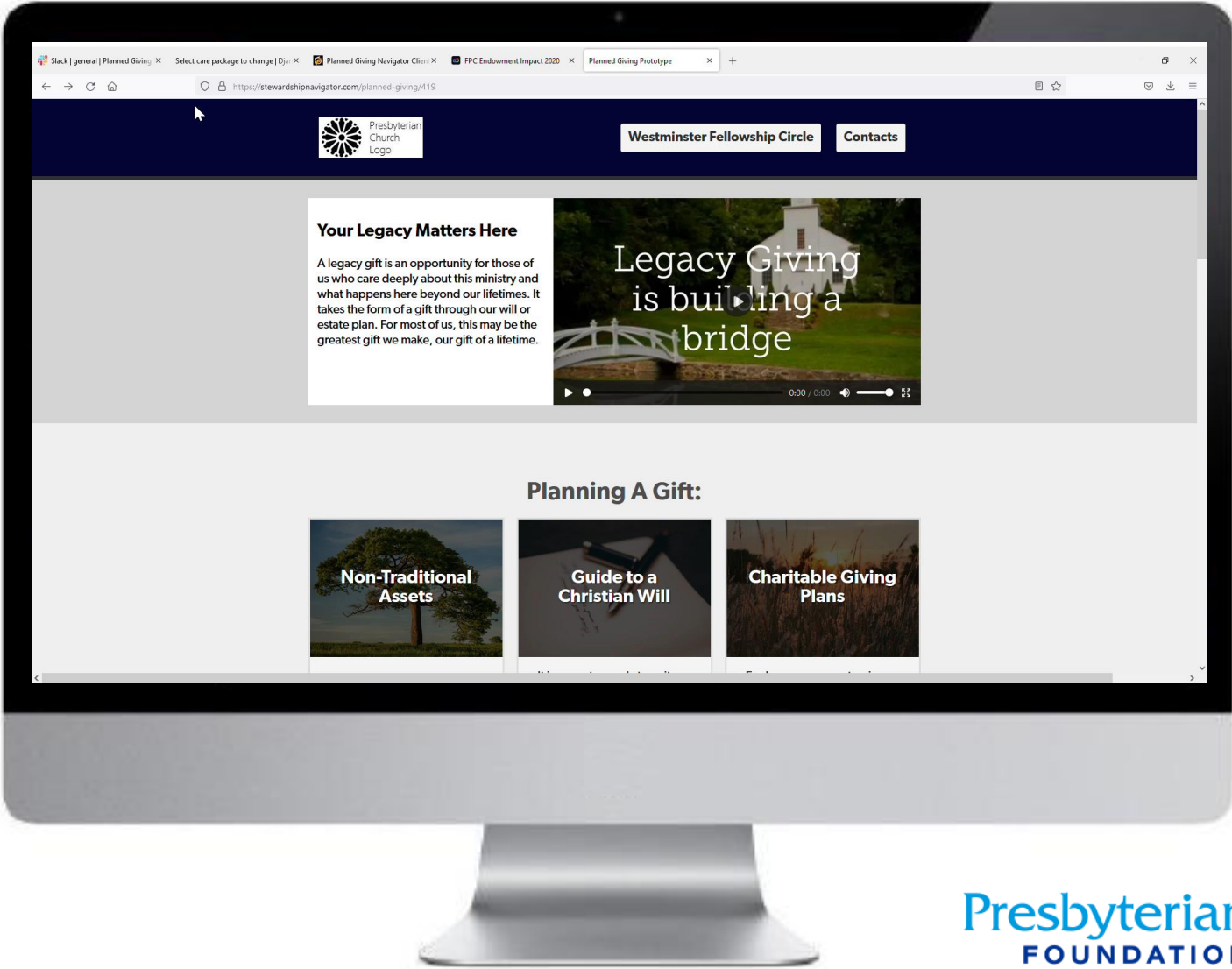
Planned Giving Web Pages 

Brochures 

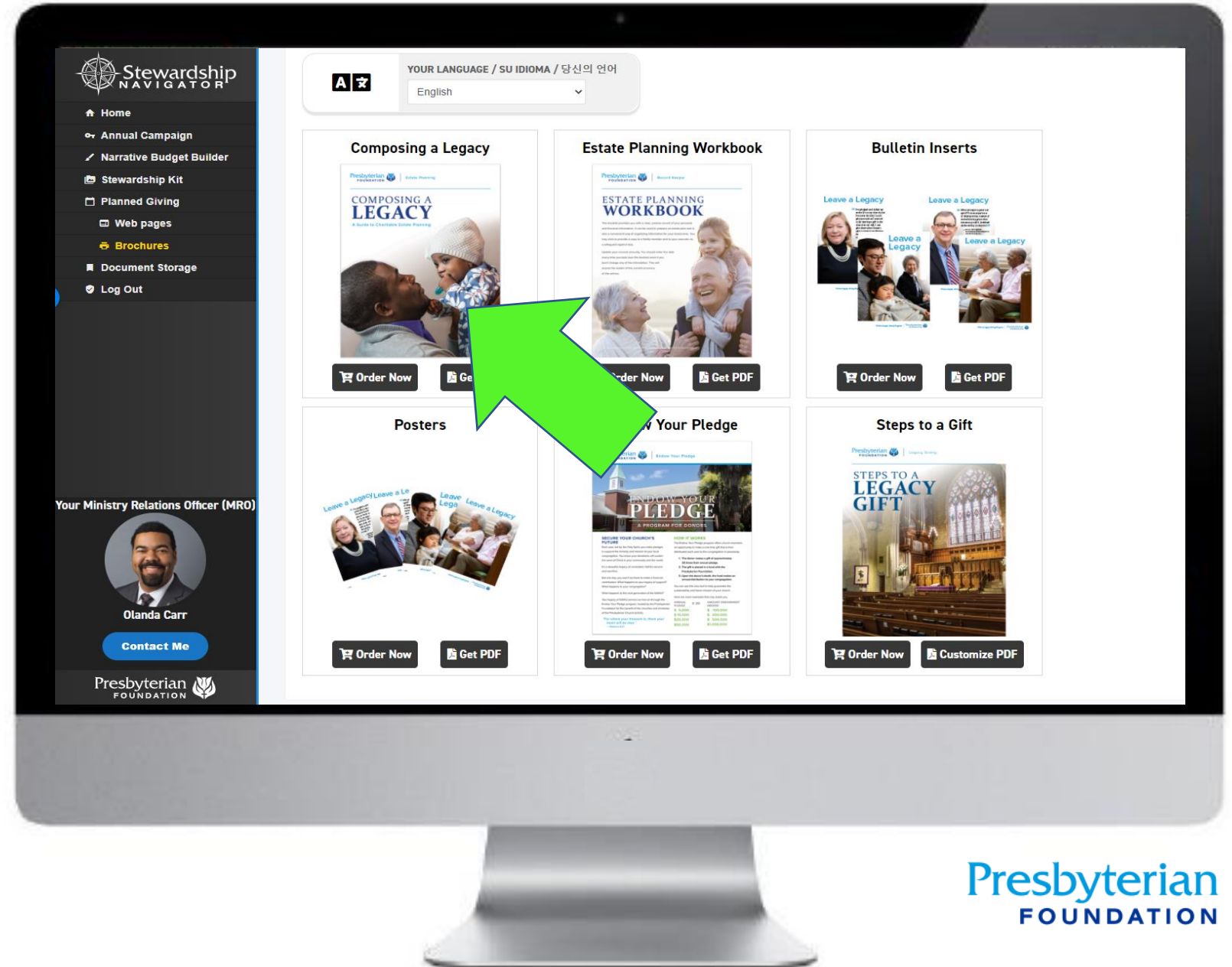
Resources 

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 have a significant impact. 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 management of your assets during your lifetime and their management after your death.

A will is the cornerstone of a solid estate plan. A good will does not make an estate plan. A good will is a legal document that makes 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. It is important to state your wishes for life support should you become unable to do so. This difficult decision from loved ones can be avoided.

Reducing estate and probate taxes is an important goal when planning your estate, allowing you to pass on more assets to your loved ones.

2 | presbyterianfoundation.org



to your loved ones. Frequently, a bequest can be a significant amount (after expenses) to your loved ones.

A bequest can be a significant amount (after expenses) to your loved ones.

KEY ESTATE PLANNING CONCEPTS

- Will
- Durable Power of Attorney
- Healthcare Proxy
- Tax-Deferred Accounts
- 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. Another option is to make a bequest to this as an outright gift. Another option is to make a bequest to the Foundation to establish a fund which will be professionally managed and distributed in perpetuity 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.

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

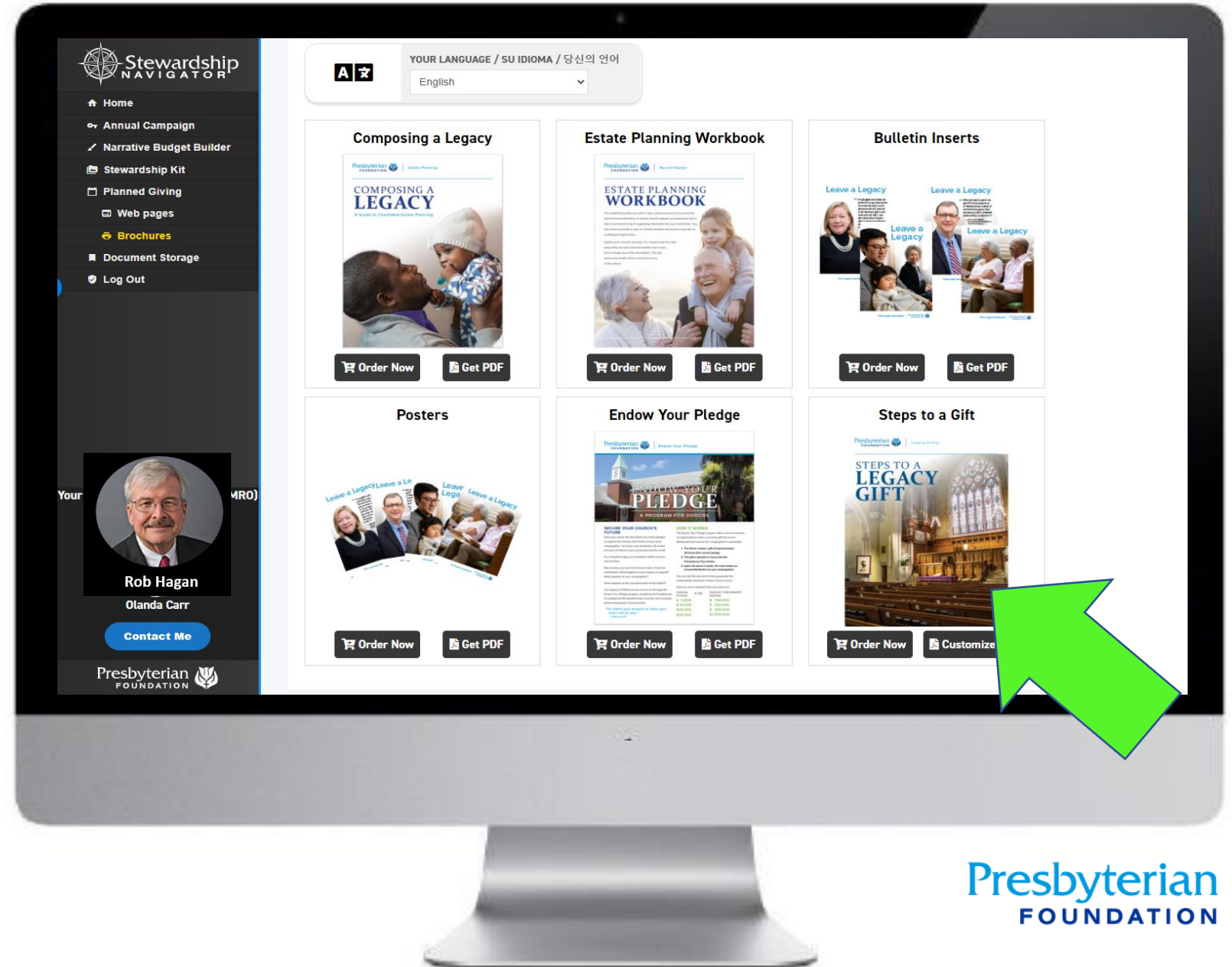
and making the most of the resources you share and invest.

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. 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 therefore the most impactful gift of our lives.

Leadership for you whose generous decisions and actions teaches others to re-deploy the resources they have. **We are grateful** to those who came before us for entrusting 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 advantages to create a powerful gift to the church.*

* Caring for estates and assets often requires help from a professional advisor. 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, 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 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 generosity.
- So that we at the church may express our heartfelt gratitude for your generosity 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

Resources...

