

# Planned Giving

A right-sized program



# Agenda

1

## OVERVIEW

What is it?  
How are we doing?

2

## THE CHALLENGE

Why so hard?

3

## THE RIGHT(sized) PROGRAM

Basic program;  
& where to get it.



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

1

# PLANNED GIVING OVERVIEW

# What is planned giving?



# planned giving

To me the  
donor

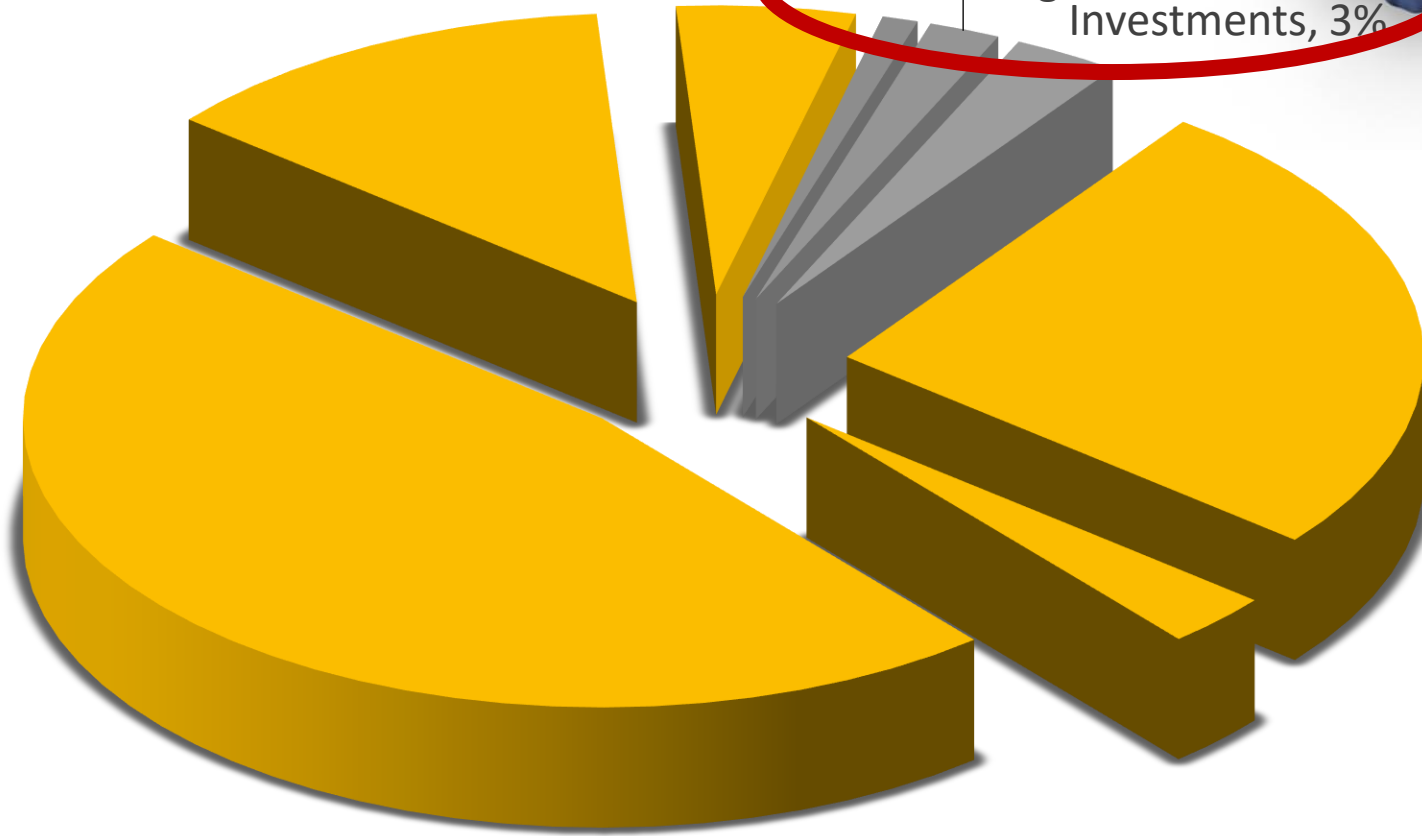
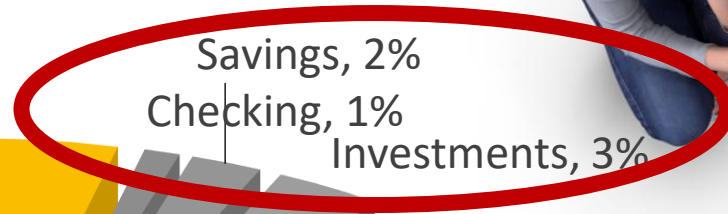
it is the

**greatest gift**

I will ever  
make.

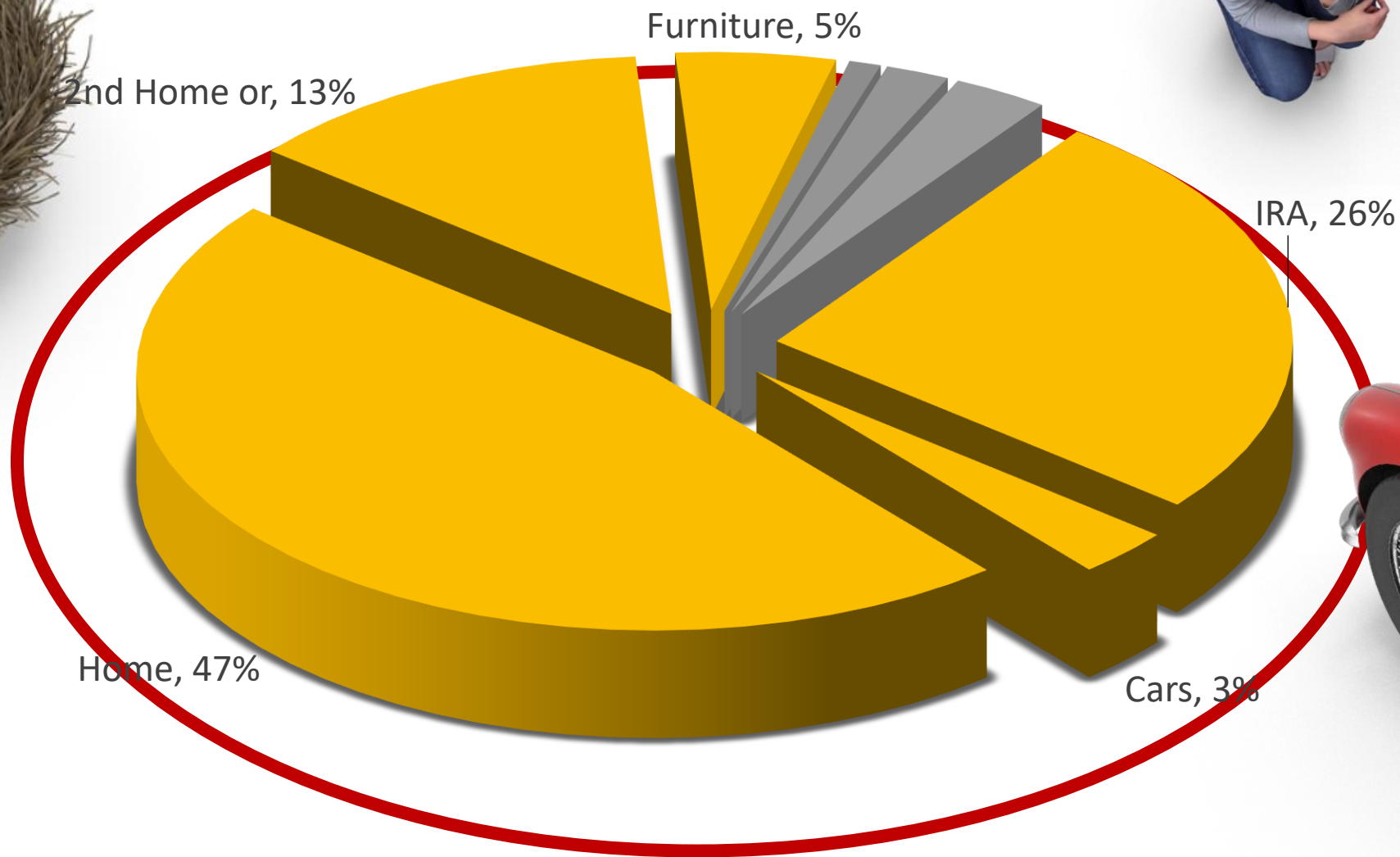
# PLANNED A GIFT

The  
GIVER



# PLANNED GIFT

The  
GIVER



# planned giving

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?



2023  
ALL Bequests

**\$45,840,000,000**

# 163,430 Feet



How big is  
\$42.68 Billion

**150,000 feet**

**35,000 feet**



PCUSA = 500 feet



# Relative Size

PLANNED GIVING

ANNUAL  
GIVING  
(lifetime)

2.74X

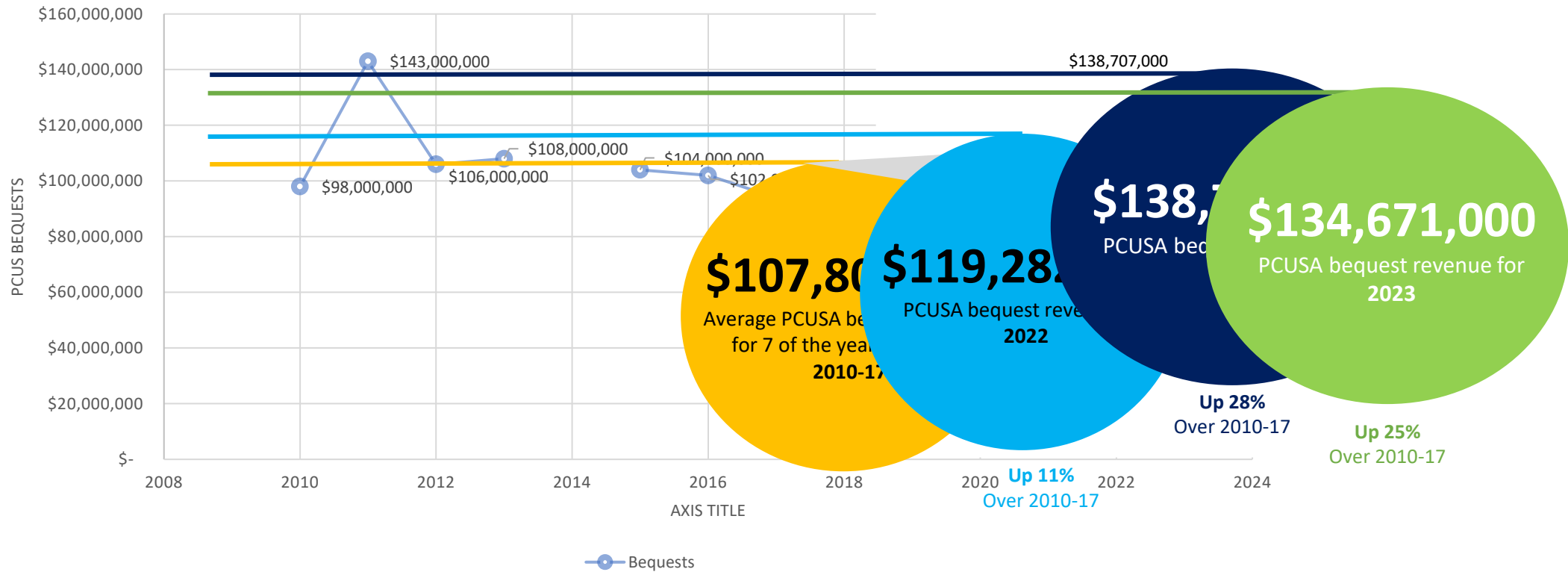
Lifetime annual giving

**How much does the PCUSA  
receive in bequests?**



# Total PCUSA Bequest Revenue

Bequests



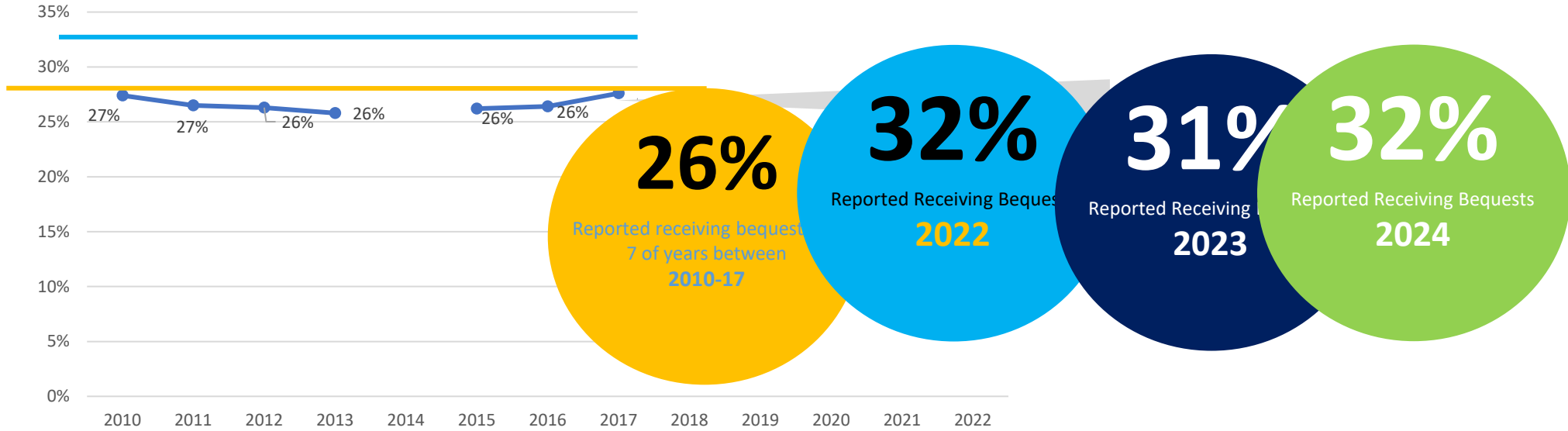
# What % of Presbyterian churches receive bequests?

- a.) 5%
- b.) 27%
- c.) 32%
- d.) 74%



# % of Churches Reported Receiving Bequests

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




# How much does the local Presbyterian church receive?

a.) \$0

b.) \$10,437

c.) \$22,230

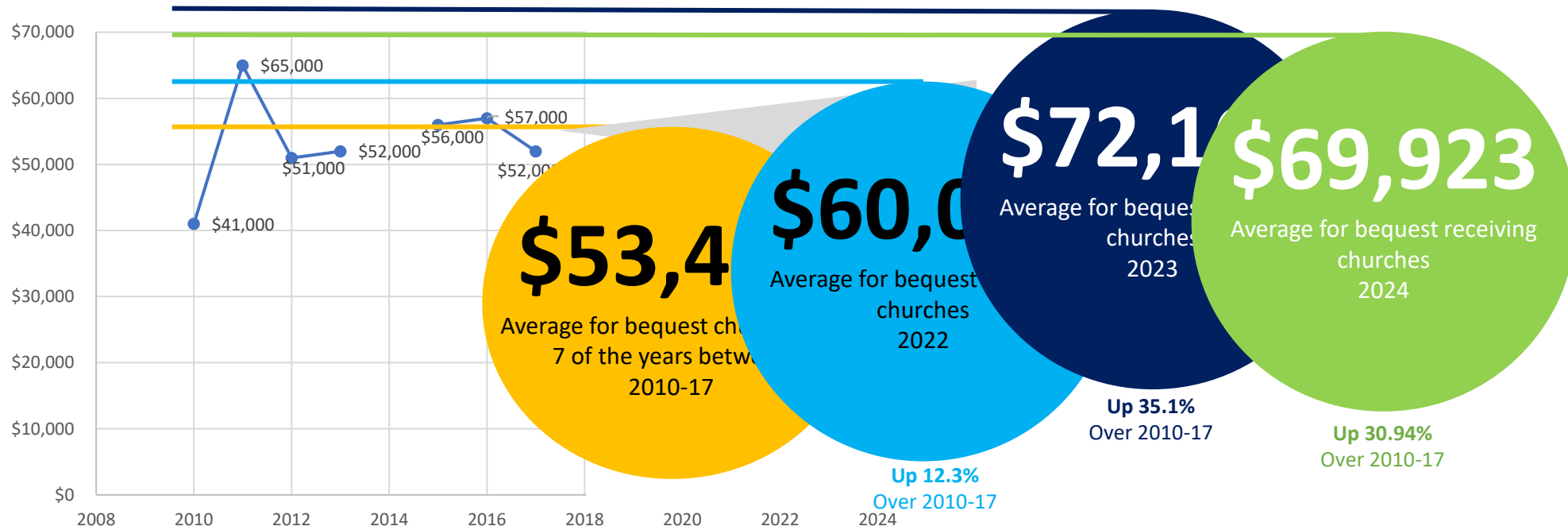
d.) \$69,923



QUIZ

# Average Bequest Revenue for bequest-receiving-churches

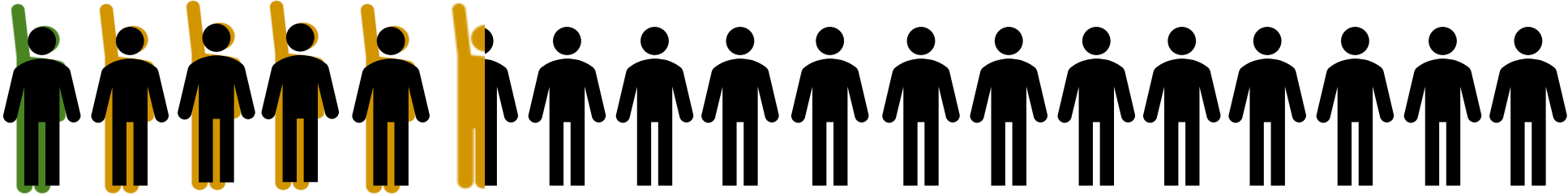
An increase of 12.3%  
Over the average for 7 of the years between 2010-2017).



**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

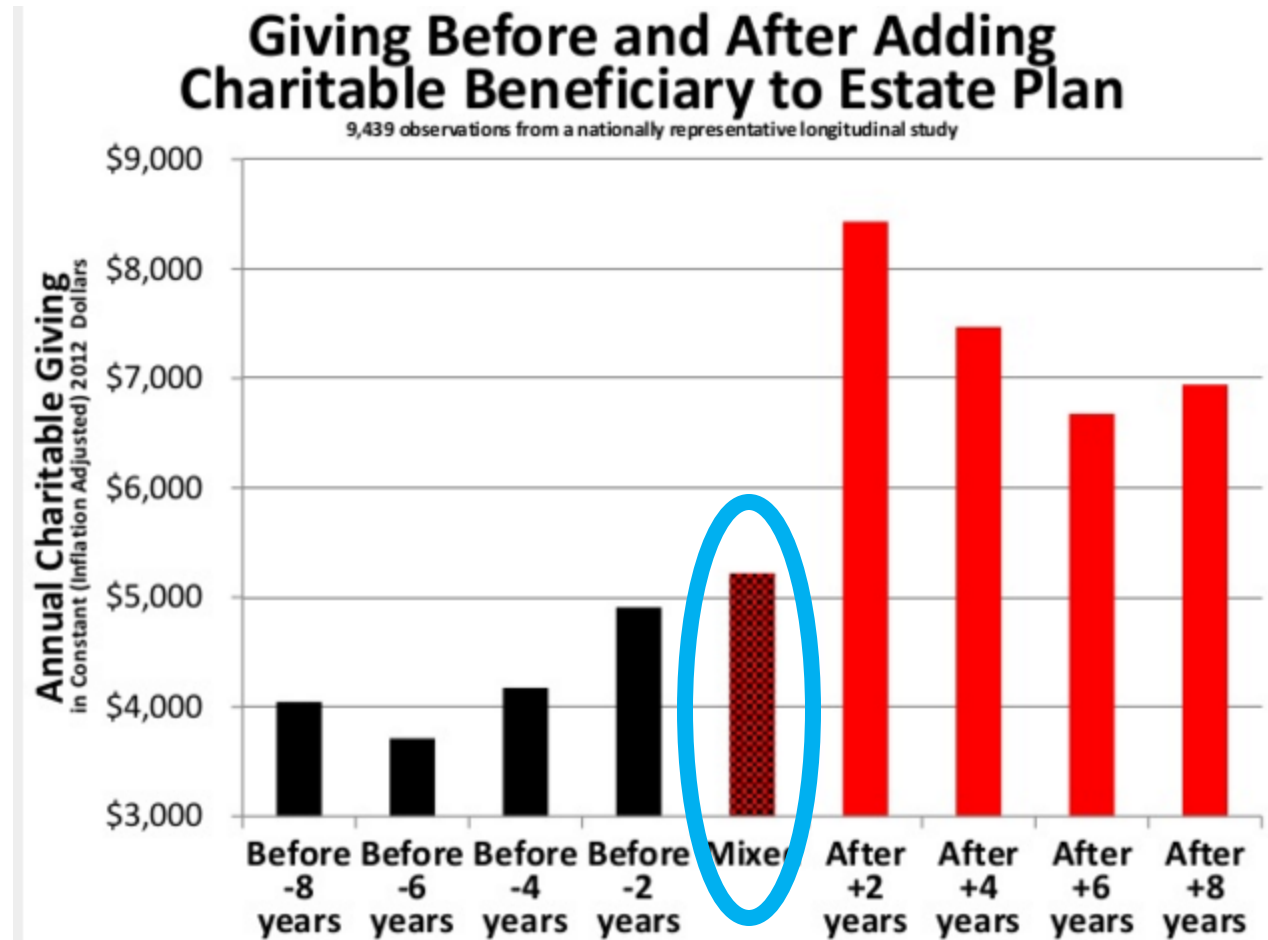
...is the average age for  
making a **first charitable  
planned gift**

**Does planned giving  
hurt annual giving?**

**YES / NO**

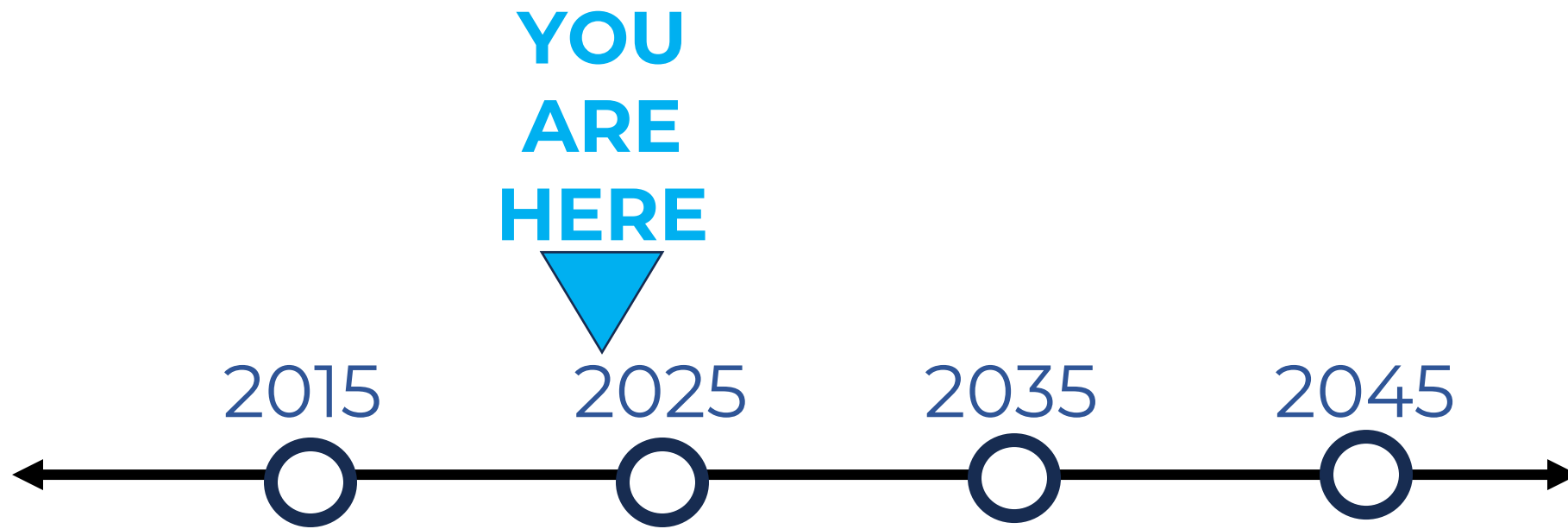


# Planned Giving



# 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

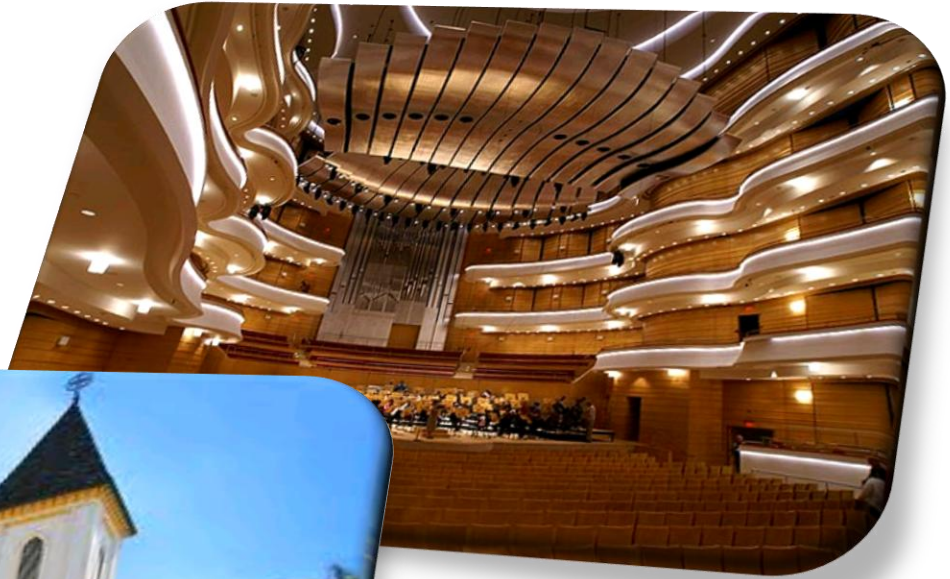
\$45,600,000,000

# PLANNED GIVING OVERVIEW

1

- ✓ Largest gift of a lifetime
- ✓ Givers are younger than we expect
- ✓ More churches are receiving
- ✓ PG is the only PCUSA financial resource increasing
- ✓ PG will increase by multiples in wealth transfer
- ✓ PG increases annual giving
- ✓ Relatively untapped

# 2 THE 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 experience
- None
- None

Budget = small



# COMPETITIVE ADVANTAGE:

Having our audience  
meet within our walls  
every week.

# WHO MAKES A PLANNED GIFT

... for their lifetime

Regular givers

Regular volunteers

Participate(d) in leadership

Spend life's most important moments here

Having our audience meet within our walls every week.

Open

Inclined

Favorably Inclined

VERY Inclined

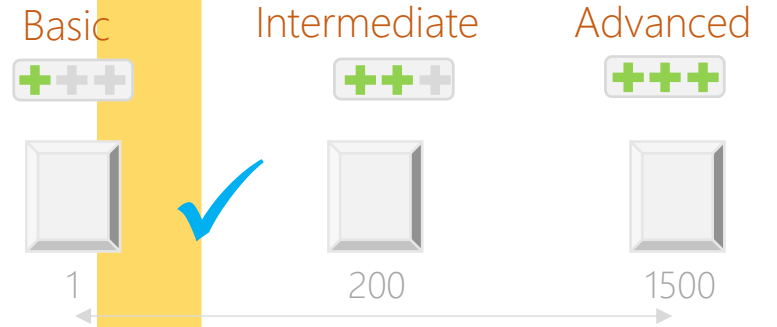
Pillar

# 3 THE RIGHT(sized) PROGRAM

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



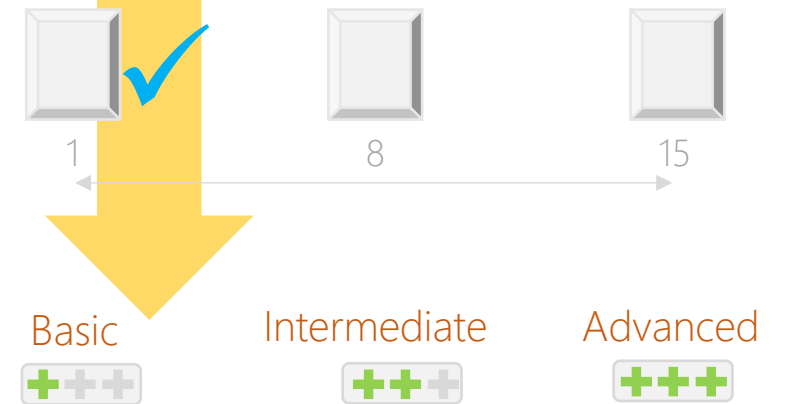
Membership



Team Members



Hours/Month



# Basic



PG Web Pages



Summer

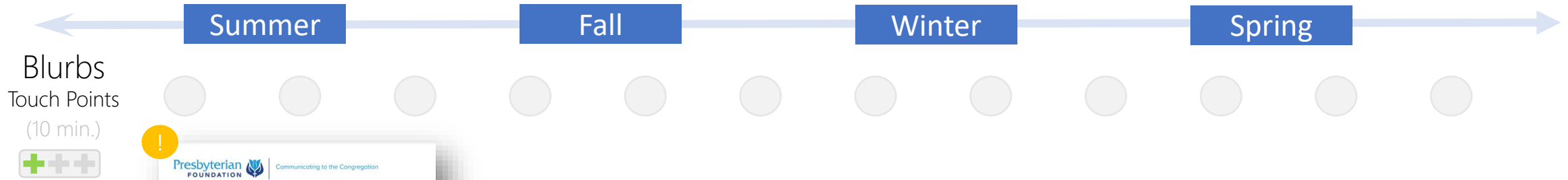
Fall


Winter

Spring

*“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?*



Blurbs  
Touch Points  
(10 min.)  


**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
- Needs 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



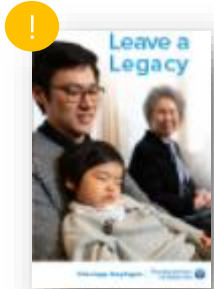
Brochure



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



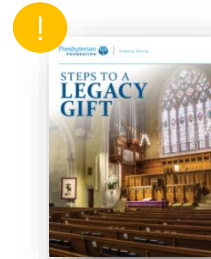
## Brochure



## 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 **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 (Leads to the Legacy Gift)  
 We request you make the pledge. All pledge commitments, from the Legacy Sunday.

**Pledge History** Increase over 2010

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

**My/Our Pledge**

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

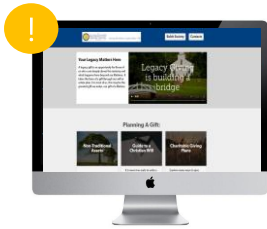
Signature of Pledgee: \_\_\_\_\_

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



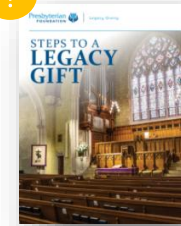
Brochure



Bulletin Insert



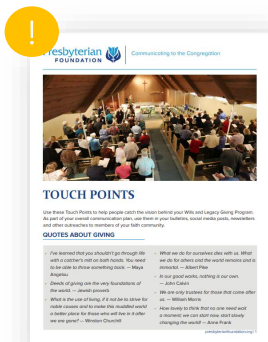
Minute for Mission



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 (Leads to our Legacy Program)  
 We request you make the pledge. All pledges are recorded, but we will not publish names.

**Pledge History**

Year	Amount	% of 2012
2012	\$1,000	100%
2013	\$1,200	120%

**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

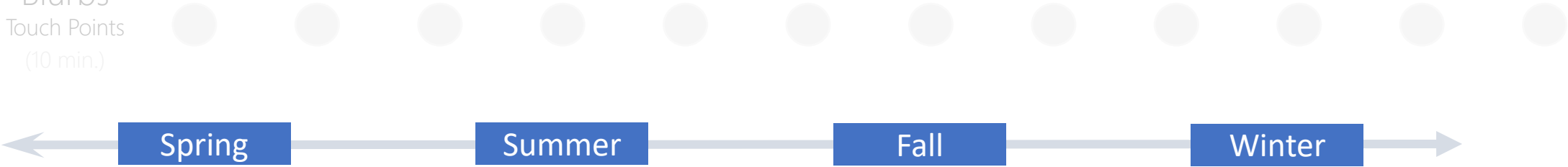
Intermediate

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  
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

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

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



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.)



Seasonal Letter/  
Article

PG Web  
Pages

Event  
Seminar

Letter  
/ Ask

PG  
Conversations



Intermediate

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

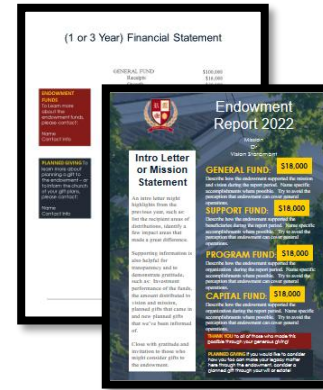
Donor  
Stories



Gratitude



(1 or 3 Year) Financial Statement



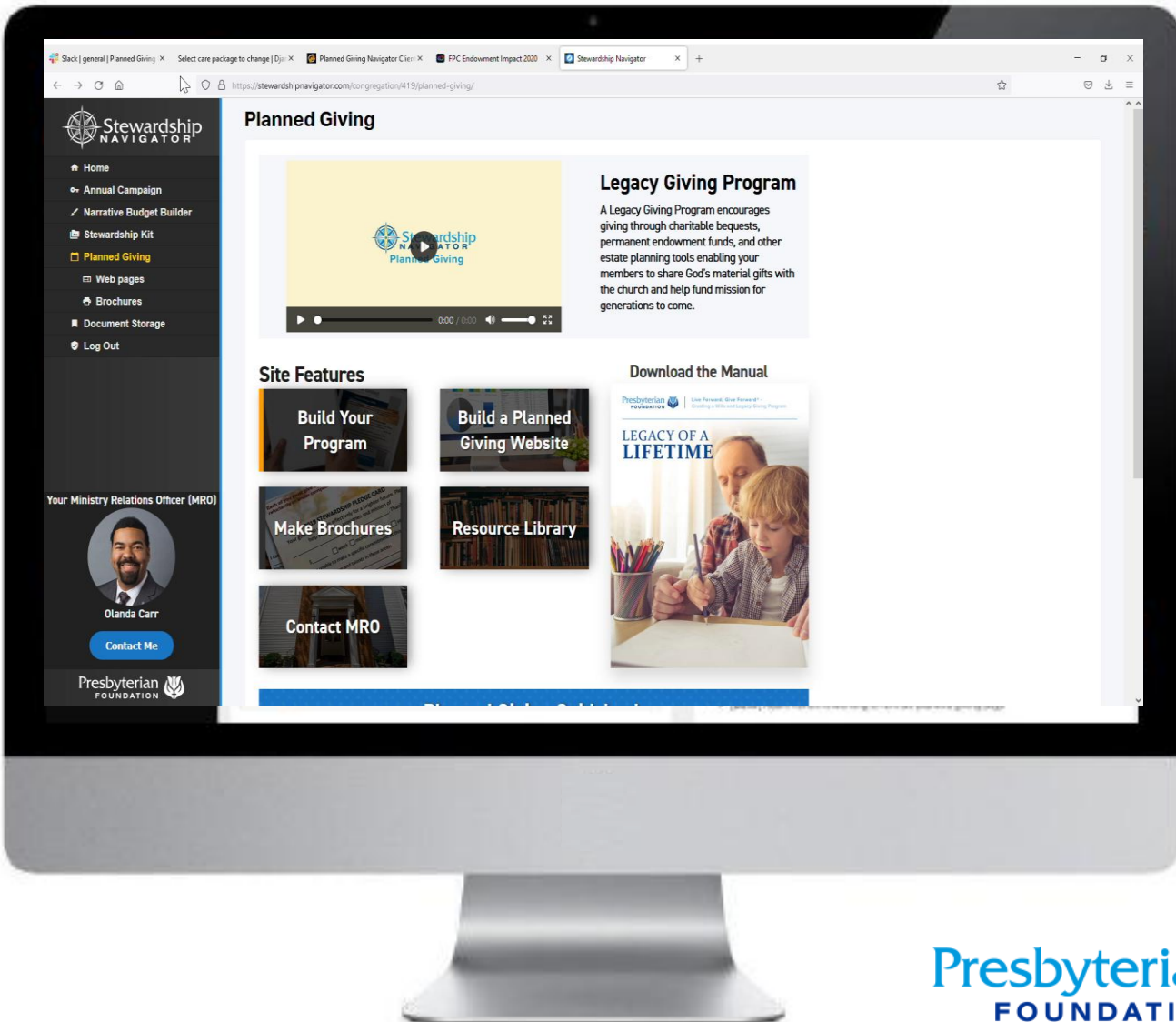
Endowment  
Annual  
Report/  
Video



# RESOURCES

# COMMUNICATE Your Program

Here's where to go...



# EXPAND

## Your Program

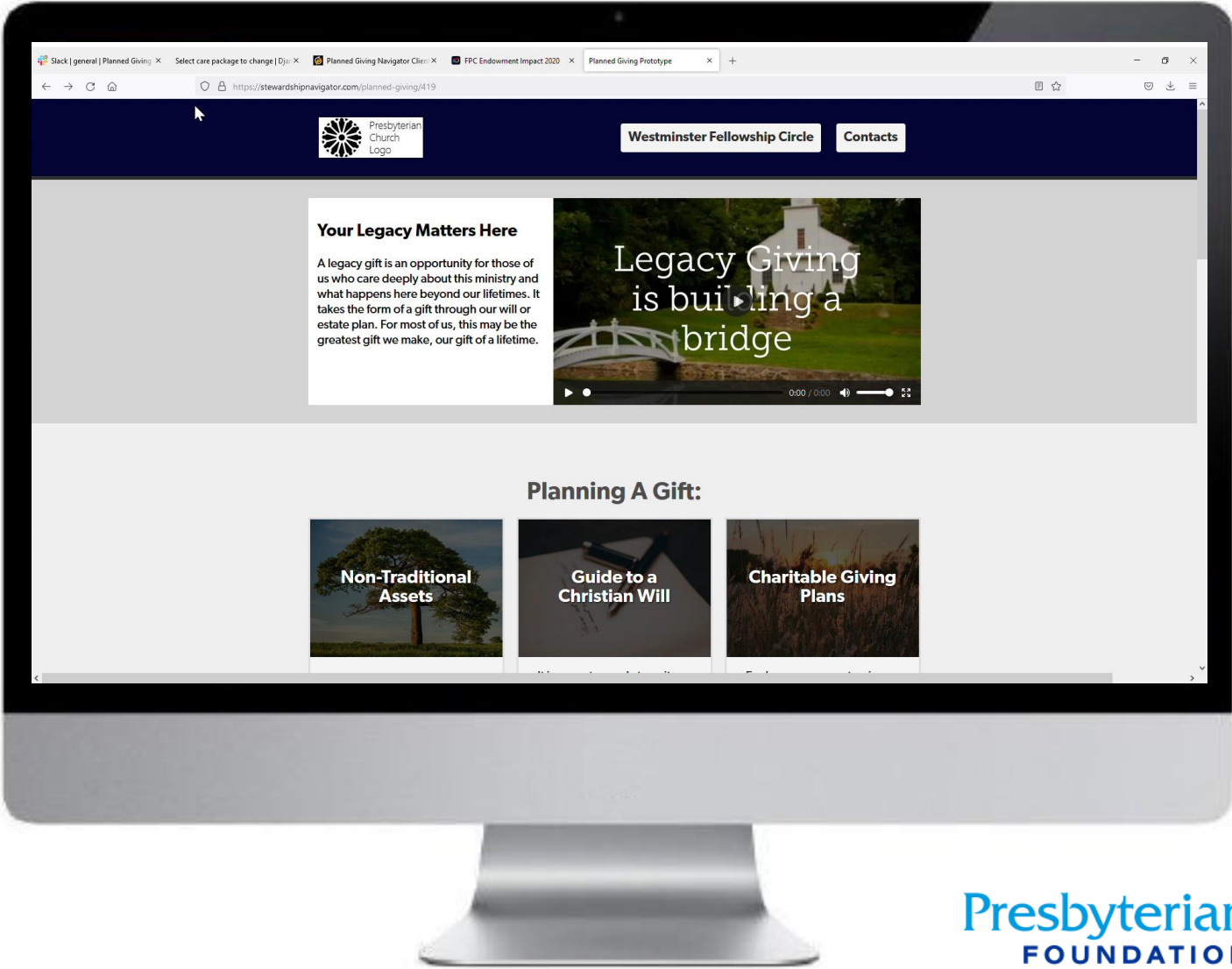
Planned Giving Web Page 

Brochures 

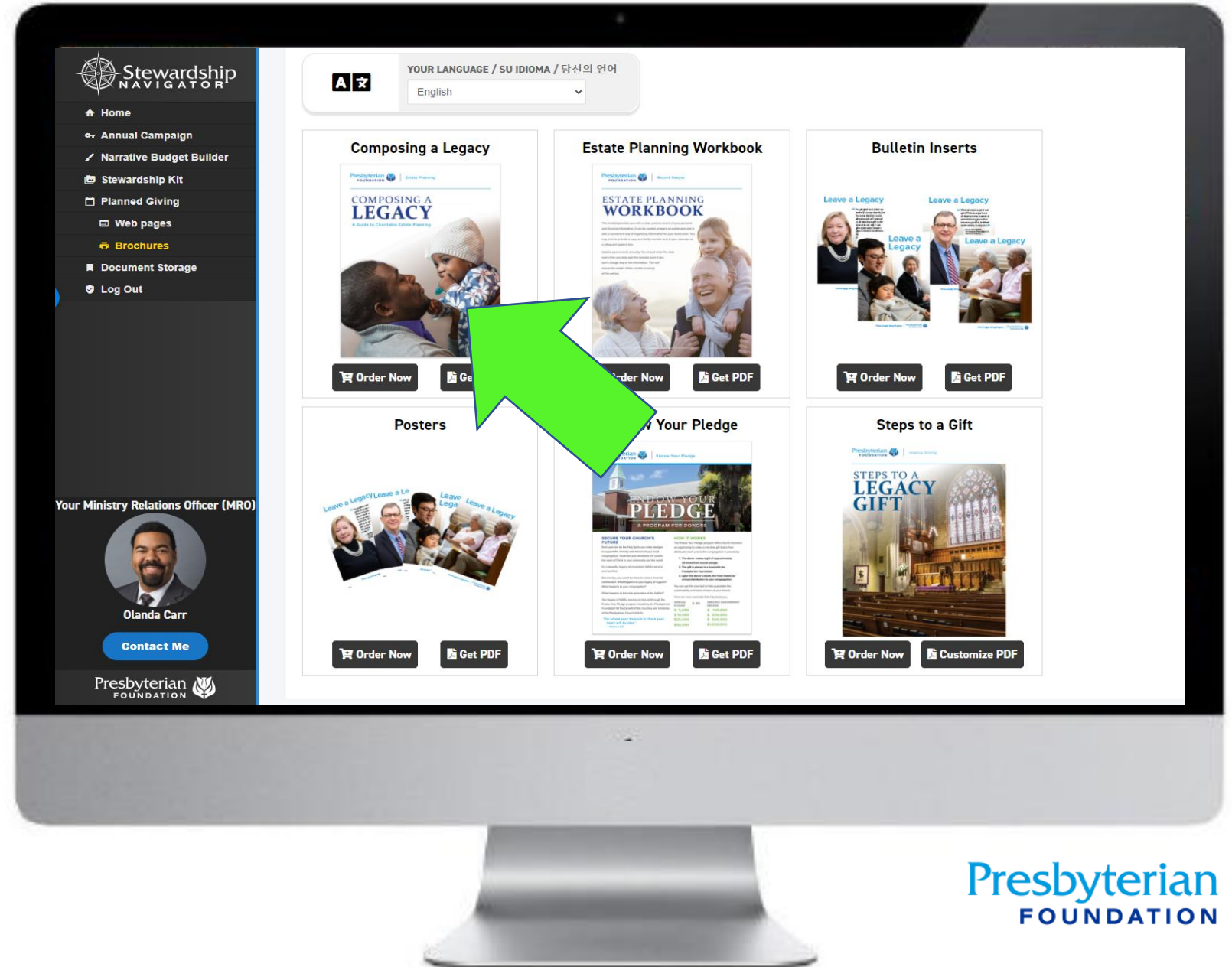
Resources 

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 overlooked. Frequently, people do 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.

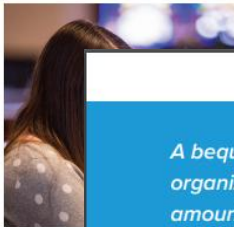
## WHAT IS ESTATE PLANNING?

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 sets out your wishes regarding guardianship of your children, your finances and your healthcare proxy with the help of an attorney for your finances and a healthcare proxy with the help of an attorney. It is a way to carry out 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 a goal when planning your estate, allowing you to pass on more assets to your loved ones.

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



to your loved ones. Frequently, people do not even identify assets previously.

A bequest can be a valuable way to support an organization you support. The amount (after expenses) can be significant.

### 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 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 way is to make a 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, who may 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

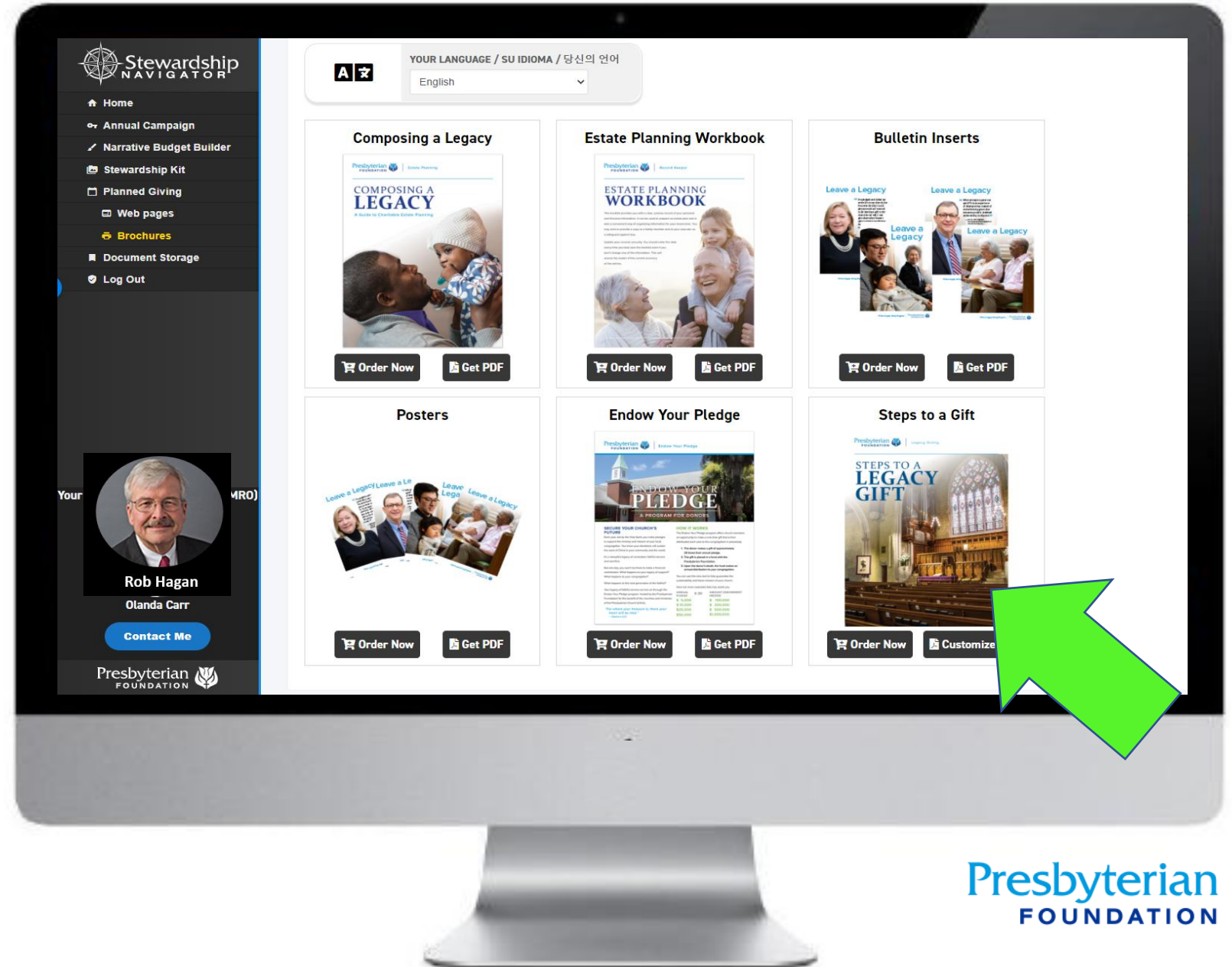
and making the most of the resources you share and invest.

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](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 make 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 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 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 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 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 in lifting the future of our church.

### JOIN THE LEGACY SOCIETY

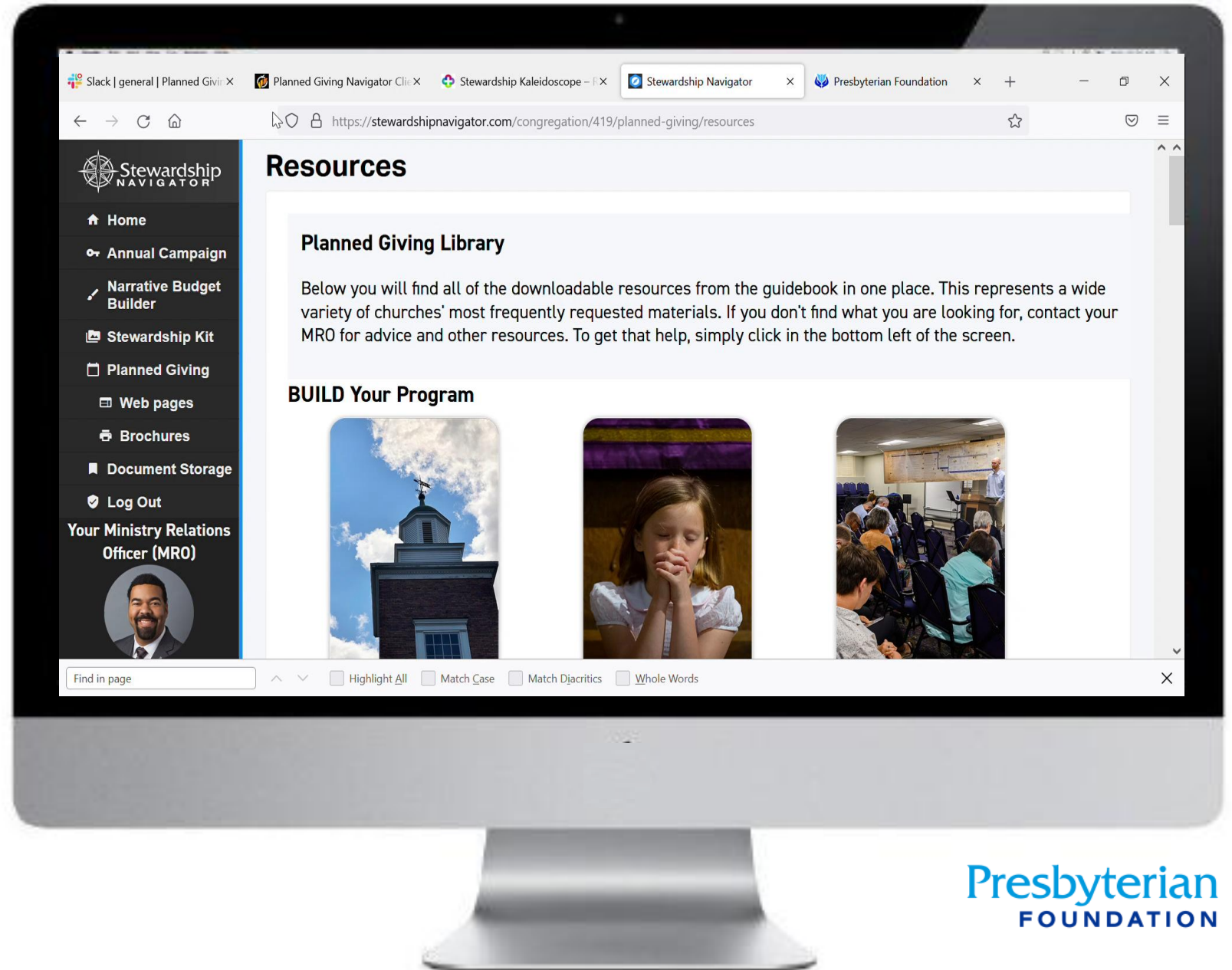
The church introduced the Legacy Society to recognize individuals or families who have made a gift to the church as a beneficiary in their will, trust, life insurance policy or other financial plan. These generous gifts ensure a bright future for future generations.

For more information, please contact:



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# Resources...





# BASIC

Broadcast

Each Year

12 Blurbs

4 Articles

2 Announcements

1 Legacy Sunday

Always

Brochure(s)

Web Pages

[www.StewardshipNavigator.com](http://www.StewardshipNavigator.com)

Guest: demo

Password: Stewardship!