

# Fulfilling Your Wishes: Planning for the end of life Webinar – February 1, 2017

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**ecf** EPISCOPAL  
CHURCH FOUNDATION  
empowering congregations

## The Episcopal Church Foundation (ECF)

Independent, lay led organization, founded in 1949

Empowers congregations through visioning and planning, leadership development, and raising financial resources for ministry

Through our programs, ECF is helping to build a Church characterized by:

- Lay and clergy leaders work together to transform the Church
- Healthy, vital, vibrant Episcopal communities of faith
- Meaningful opportunities for Christian stewardship and effective fundraising
- Innovative, mission-based ways to be the Church of the future



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## What is the Episcopal Church Foundation (ECF)?

### Overview:

- Independent and lay-led foundation
- ECF's mission is to strengthen the **leadership** and **financial** capabilities of Episcopal congregations, dioceses, and other institutions
- ECF carries out this mission through a wide array of programs including...



### Leadership Resources

- ECF Vital Practices (ecfvp.org)
- Vestry Resource Guide
- Fellowship Partners Program
- Educational Events
- Vital Teams

### Financial Resources

- Capital Campaigns
- Planned Giving
- Endowment Management
- Annual Giving/Stewardship
- Strategic Solutions



## Fulfilling your wishes

- Reflect
- Remember and Respond
- Record



## Medical Directives & Health Proxies

- Choose your health proxy and alternate
- Review State requirements and forms
- Record wishes to guide decisions



## Planning your funeral/memorial

- Choose your advocate and review wishes
- Record wishes to guide decisions
  - Funeral plans
  - Organ donation
- Where are necessary documents?
  - Grave or columbarium documents
- What do you wish to have in your obituary?



## Planning your estate

- Seek appropriate legal, financial & tax advice
- Choose an executor, and an alternate!
- Review all assets, insurance policies, etc.
- Let your family know your wishes
- Making planned gifts
- Review your plans from time to time
- The future of Estate Tax??



## Know your assets!

- **Wills or Living Trusts: Probated Assets**
- Pay on Death arrangements
- Tax Deferred Accounts: IRA, 401k, 403b
- Life Insurance proceeds
- Real estate and titles
- Donor-advised Fund (New ECF option)



## What are Planned Gifts?



Planned gifts are a variety of charitable giving methods that allow the donor to express his or her personal values by integrating charitable, family and financial goals.

## Resources for Ministry

### Ultimate - Planned Giving

The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses. (BCP pg. 445)

## Types of Planned Gifts

- Bequests given through wills
  - (80% of Planned Gifts)
- Life Income Gifts (LIG)
  - Pooled Income Funds (PIF)
  - Charitable Gift Annuities (CGA)
  - Charitable Remainder Trusts (CRUT/CRAT)
- Special Asset Gifts: 401(k) & Tax Deferred Accounts, Life Insurance, Real Estate, other appreciated property
- Charitable Lead Trusts



# Questions?

## Donor Website for Planned Gifts

Visit: [www.Episcopalgifts.org](http://www.Episcopalgifts.org)

- Descriptions of types of planned gifts
- Simplified Life Income Gift Illustrations
- Donor Stories, which gifts are right for you?
- Planned giving and tax update news  
.....and much more

## New DONOR ADVISED FUND

- Available now!
- New tool for Episcopal Donors
- Make a gift now and decide in the future how to distribute it or allow is to grow for greater impact
- Contact Jim Murphy at 800-697-2858  
for more information



## Fulfilling your wishes

- Review your wishes, responsibilities and passions
- Discuss with family and friends
- Keep good records and inform people where to find them
- Complete all necessary legal and allocation documents

## Recorded Webinars to Empower your Leaders

- Basics of Planned Giving for Parish Leaders
- Basics of Endowment Management for Parish Leaders
- Prospective Donors of Planned Gifts
- Basics of a Capital Campaign
- Annual Stewardship
- Vestry Leadership 101

**For links to recordings visit: [www.ecfvp.org](http://www.ecfvp.org)**

## Upcoming Free Live Webinars

*Check our website, under  
Events, for more info.*



## At your service

ECF always available to assist at (800) 697-2858

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