

Creating a Legacy Society and Using ECF Resources In your parish

Diocese of Washington

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Episcopal Church Foundation

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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

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

Financial Resources

- Strategic Solutions
- Planned Giving
- Endowment Management
- Donor-advised Fund

What is special about Planned Giving?



- Future focus
- Donor passion
- A planned gift raises the institution to the level of family in a person's estate plans
- Sensitivity to individual needs, estate planning and end of life issues
- Building trust & sustaining awareness

Types of Planned Gifts

- Bequests
 - By will/trust/account designation
 - 80% of planned gifts
- Life Income Gifts
 - Pooled Income Fund (PIF)
 - Charitable Gift Annuity (CGA)
 - Charitable Remainder Trust (CRUT/CRAT)
- Special Asset Gifts
 - From retirement accounts (401(k), IRA), life insurance, real estate, other appreciated property
- Charitable Lead Trusts

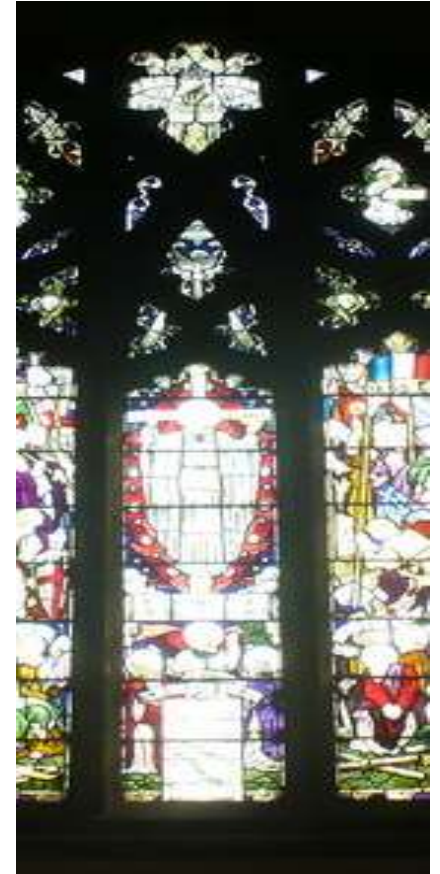
How will your parish move forward?

What is your parish's next step?

Your PG Ministry

“For Keeps”

- Keep people informed
- Keep track and respond to inquiries
- Keep saying “Thank You” !



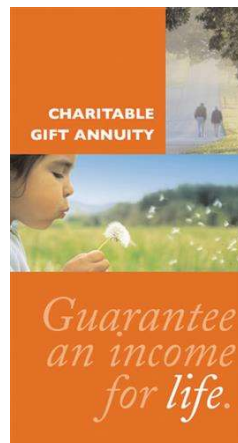
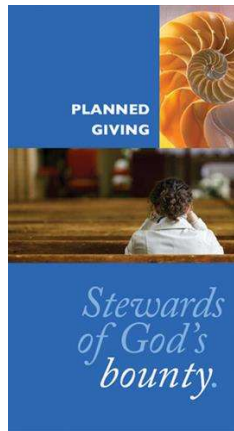
Resources from ECF

- Endowment & Gift Acceptance Policies
- Investment of Permanent Assets
- Life Income Gift Illustrations
- Direct Leadership Support
- Webinars for Adult Forums
- Booklets/Brochures (steal our text!)
- Funding Future Ministry
- Planned Giving Sponsored Website for Donors www.episcopalgifts.org
- **Planned Giving on Demand**



Use Printed Resources.....

- Get brochures, booklets and other resources



TRINITY EPISCOPAL CHURCH

Planned Giving



*Providing for those who follow us
Sharing the blessings of our life
Ensuring the future of ministries
near to our heart*

Planned Giving... a Legacy of Love

Planning how to best use the financial resources God has graciously bestowed upon us is challenging. Making provisions for the stewardship of our assets to ensure our care as we age and to sustain Trinity's ability to meet the spiritual needs of future generations is a lifelong Christian responsibility. Just as we each consider what portion of our household budget we can commit to Trinity during the Annual Campaign, it's important that we make long-term, strategic decisions regarding ways we can support our spiritual home and the good works it performs. Many of us

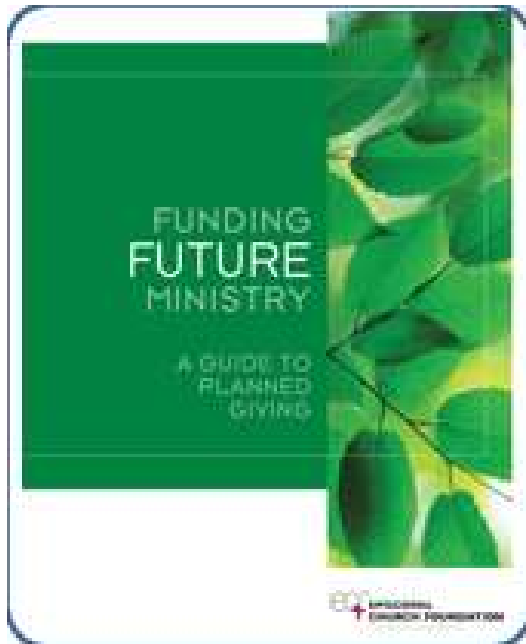
benefits in addition to the joy of returning bounty unto the Lord.

We are especially pleased with the income opportunities available to parishioners through the Charitable Gift Annuity Program managed by ECF.

Concerned About Income In Retirement?

At age...	You can receive for life...*
55	4.4%
65	5.3%

Funding Future Ministry



- FFM printed copy included with *Planned Giving on Demand* toolkit
- E-book now available separately for \$9.95 on Amazon.com
- Sample parish materials and various resources still available online

www.episcopalgifts.org

Gift Options



Donor Stories

Learn how others have made an impact through their acts of giving to your preferred Episcopal charity or parish and others. Explore the many benefits of charitable gift planning.

[More](#)

Planned Giving helps you meet your personal, financial and estate planning goals by making a lifetime or testamentary charitable gift. Learn about the benefits below.



What to Give

Find out what type of assets make the best planned gifts. Learn about gifts of



How to Give

Learn how to make a gift that provides tax benefits and even life income.



Planned Gifts Calculator

View a presentation that shows the benefits of a planned gift based on your

What is *Planned Giving on Demand*??

- A toolkit that empowers leaders!
- Learn at your own pace
- Everything you need in one place
- Consider joining ECF new national network of PG Shepherds





Use the tools, now and in the future

- All resources will be updated and refreshed on an on-going basis
- Plan your own education and your other volunteers
- Plan your next steps
- Take your first step.....

Starting PG in your parishyesterday!

- **Step by step guide, levels 1-5**
- **Choose PG Shepherds and educate them!**
- Share 'Basic' webinars
- View the 'quick start' article
- **Contact ECF to create/review Endowment & Gift Acceptance Policies**



Webinars to educate and share


Episcopal Church Foundation VII x

ecfvp.org/webinars/259/fulfilling-your-wishes-medical-preferences-and-end-of-life-planning

Fulfilling your Wishes: Medical Preferences and End-of-Life Planning

Jim Murphy, May 29, 2020 11:00AM

The Covid-19 pandemic has heightened the urgency of ensuring that our loved ones know our end-of-life wishes. Please join Jim Murphy to learn more about how to communicate your wishes about medical care, how your assets are distributed at your death, and the kind of funeral or memorial service you prefer. ECF thanks the Diocese of Vermont for hosting this video.



RELATED WEBINAR


Making the Best Gift for You Now and in the Future

RELATED POST

Are you Ready? Preparing for Year-end Giving

RELATED ARTICLE

Turning Burdens Into Blessings



PowerPoint slides for Fulfilling your Wishes


Episcopal Church Foundation VII x

ecfvp.org/webinars/260/making-the-best-gift-for-you-now-and-in-the-future

Making the Best Gift for You Now and in the Future

Jim Murphy, May 29, 2020 12:00PM

Have the recent changes in tax law confused or surprised you? Would you like to support your parish or favorite Episcopal charity more effectively? Are you approaching your 72nd birthday or starting to prepare for retirement and want to coordinate your charitable giving and steady income? Please join Jim Murphy to learn how tax law changes and other factors can enable you to give more to charity while also benefiting yourself. ECF thanks the Diocese of Vermont for hosting this video.



RELATED WEBINAR


Fulfilling your Wishes: Medical Preferences and End-of-Life Planning

RELATED POST

Are you Ready? Preparing for Year-end Giving

RELATED ARTICLE

Turning Burdens Into Blessings



PowerPoint slides for Making the Best Gift

Quick Start Article

Starting Planned Giving from Scratch

What's the sure-fire way to set up a planned giving effort from scratch in any congregation? There's no magic bullet. I've worked with congregations all across the country, and I've learned that each is unique. However, there are some basic steps that should work for almost any Episcopal faith community:

Choose your Shepherd: Appoint and empower at least one leader to oversee your effort.

Empowered and appropriate leaders are essential for success in every ministry. Your planned giving ministry is no different. Here are some things to keep in mind:

- Your PG shepherd (and yes, you can choose more than one) should be knowledgeable about your congregation, its history and ministries, and care deeply about its future.
- She/he should be responsible, trustworthy, discreet, well-respected, and happy to work with others.
- Your PG shepherd does NOT need to be a professional fundraiser, financial consultant, or lawyer. However, your shepherd should be willing to learn the basics about planned giving.



Basic steps for starting a planned giving program for your congregation.

Questions?

Who is your PG Shepherd?

- Who is willing to learn more and agrees to do something about Planned Giving at your congregation?
- Your Shepherd(s) should be dedicated to moving your church to have a Legacy Society.
- Remember to keep your Rector & Vestry up to date!



Forming a PG Committee

Members should:

- Have made a planned gift
- Be good listeners
- Be good stewards of donor's interests
- Have realistic expectations



Legacy Societies

Why have a legacy society?

- Raise awareness of planned giving options
- Opportunity for witness
- Provide a system for acknowledgements
- Stay connected with donors, an opportunity for Ministry!



Building PG in your parish

Level 5: Legacy Society Stage

- Expand the number of volunteers and share leadership
- Establish Membership Criteria & consider the “Founding Members”
 - Be as inclusive as possible –
- Plan the next 12 months and an inaugural event
- Create Enrollment & Acknowledgement plan
- Hold annual “Thank You” event
- Witnessing, in person and on video



Trinity Cathedral, Little Rock AR



...and set it between Mississ and
Stone & called the name of it Stone
Eger (that is, today the stone of help)
saying, Hitherto hath the Lord helped us
My brethren, all earthly things
are presented to us in time & place
and we are accustomed to
mark the locality of great men
by appropriate monuments &
to commemorate them by
special observance of the
anniversaries. We indicate
distances on our highways
by milestones, & the flow of the
of time by marking days, weeks,
& years. And it is well for us
to have some mark a stone



"Hitherto hath the Lord helped us
Need years 1557
-opined.



Questions?

How will your parish move forward?

What is your parish's next step?

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

Upcoming Free Live Webinars

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

At your service

Endowment Management, Planned Giving & Donor Solutions – 800-697-2858

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