

Legacy Societies and your Planned Giving Ministries

THE EPISCOPAL CHURCH FOUNDATION



June 3, 2015

Jim Murphy

Managing Program Director, ECF

Beth Hathaway

Trinity Cathedral, Little Rock, AR

Jean Szen

St. Paul's, Naples, FL

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

- Vision and Strategic Planning
- Capital Campaigns
- Planned Giving
- Endowment Management
- Annual Giving/Stewardship

What is special about Planned Giving?



- Future focus
- Donor passion
- A planned gift raises the congregation 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

Promoting Planned Giving



For all levels of a PG program:

- Awareness
- Basic understanding of the “why’s” & “how’s” of planned giving
- Competition from other charities

Who is your PG Shepherd??

- Who is willing to learn more and agrees to do something about Planned Giving at your congregation?
- Your Shepherd 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!



Legacy Societies



Creating a Legacy Society

- Establish a Name/Theme & Create promotional brochure
- Establish Membership Criteria & Consider the “Founding Members”
- Create Enrollment & Acknowledgement plan
- Hold annual “Thank You” event
- Pins, Gifts, Recognition

Questions so far?

Trinity Cathedral, Little Rock AR



Trinity Cathedral, Little Rock AR



...and set it between Niagara and
 ... & called the name of it the
 ... (that is, the stone of help)
 ... saying, hitherto hath the Lord helped us
 ... My brethren, all earth's things
 ... are presented to us in time
 ... and we are accustomed to
 ... make the locality of great
 ... by appropriate monuments &
 ... to commemorate them by
 ... special observance of the
 ... anniversaries the indicate
 ... distances on our highway
 ... milestones, & the flow of time
 ... of time by marking days, weeks,
 ... & years. and it is well for us
 ... to do. Thus Samuel took a stone



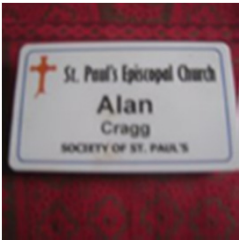
"Hitherto hath the Lord helped us.
 New Year 1857
 -Spauld."



St. Paul's, Naples FL



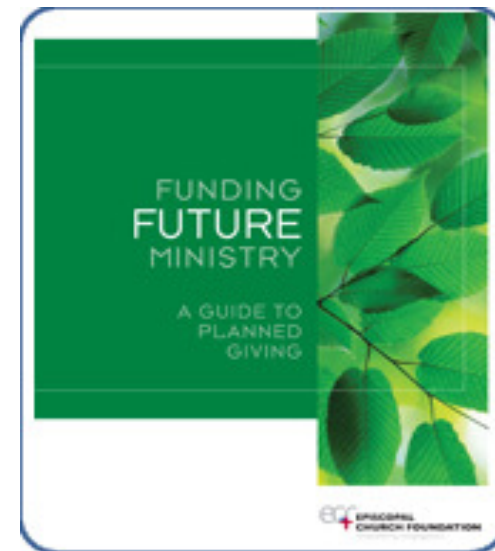
St. Paul's, Naples FL



PG Resources from ECF

Resources from ECF

- Funding Future Ministry
- Life Income Gift Illustrations
- Planned Giving Sponsored Website for Donors www.episcopalgifts.org
- NEW RESOURCE:
 - *Planned Giving on Demand*



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



Questions?

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

- **Legacy Societies and your Planned Giving Ministry**
 - June 3, 2015 – 7:00 - 8:00 PM Eastern Time
- **Investing your Endowment**
 - July 22, 2015– 7:00 PM – 8:00 PM Eastern Time
- **Using the Tools of ECF’s Planned Giving on Demand**
 - September 2, 2015– 7:00 PM – 8:00 PM Eastern Time
- **Basics of a Capital Campaign**
 - September 23, 2015– 7:00 PM – 8:00 PM Eastern Time
- **Basics of Endowments**
 - October 29, 2015– 7:00 PM – 8:00 PM Eastern Time

Check our website www.episcopalchurchfoundation.org,
under Events, for more info.

At your service

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

Jim Murphy, Managing Program Director,
Financial Resources

jmurphy@episcopalfoundation.org

Ken Quigley, Program Director,
Endowment Management Solutions

ken@episcopalfoundation.org

Meg King, Assistant Program Director,
Financial Resources

mking@episcopalfoundation.org

