

Starting and Sustaining Planned Giving in Your Episcopal School

THE EPISCOPAL CHURCH FOUNDATION



What you need to know for today!

- All phones will be muted.
- Use the “chat” tool on the webinar screen to ask a question or make a comment.
- The webinar will be recorded and available for future viewing on the NAES website.

January 14, 2016

Panel Members:

Lou Porter Bailey, Director of Alumni Relations and Planned Giving, St. Stephen's Episcopal School, Austin TX

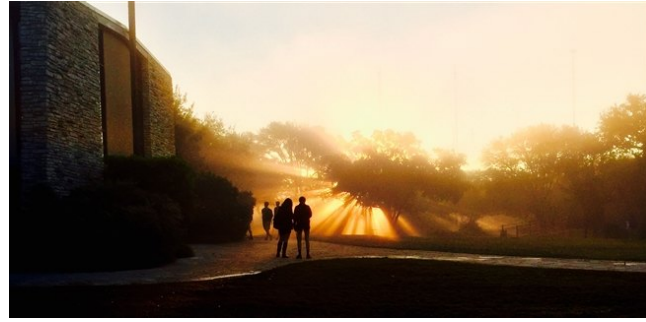
Valerie L. Burke, Director of Development, St. Stephen's & St. Agnes School, Alexandria VA

Timothy H. Graham, Director of Development, St. Andrew's/Sewanee, Sewanee, TN

Jim Murphy – Moderator

Managing Program Director, ECF

St. Stephen's Episcopal School, Austin TX



St. Stephen's & St. Agnes School, Alexandria VA



St. Andrew's/Sewanee, Sewanee, TN



Planned Giving-Panel Discussion

- Successes and challenges
- Future Plans
- Tips for others schools



Valerie Burke



Lou Porter Bailey



Tim Graham

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

Questions for panel?

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

At your service

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

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Meg King, Assistant Program Director,
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Online learning with NAES

Upcoming Webinars

Leadership Skill Series: Interviewing 101 - Thursday, January 28, 2016

Disruptive Service: Moving From Needs to Assets - Thursday, February 11, 2016

Webinar Archive

- Episcopal Identity 101 (September 2015)
- Considering a Capital Campaign (October 2015)
- Marketing Your School's Episcopal Identity (March 2015)