

Charitable Gift Annuities: Successes in 2013 and Planning for 2014

Presented by
The Episcopal Church Foundation
February 4, 2014 - 2pm Eastern Time



Agenda

- Welcome
- ECF Update and CGA results for 2013
 - Jim Murphy, Meg King
- ECF Financial Update
 - Craig Bossi, ECF's Chief Operating Officer & Vice President of Finance
- Reflections on Challenges and Successes with CGAs from "the trenches"
 - The Rev. Dwight Helt, Rector St. John's Episcopal Church Norman, OK
- Review of CGA's from State Street Global Advisors
 - Joanne Pipkin, Principal Team Leader, SSgA- CAM
- **Discussion**



CGA results for 2013

- ECF Update and CGA results for 2013
 - Jim Murphy, Managing Program Director
 - Meg King, Assistant Program Director



ECF Financial Update

- ECF Financial Update
 - Craig Bossi, ECF's Chief Operating Officer & Vice President of Finance



Challenges and Successes with CGAs in 2013

- Reflections on Challenges and Successes with CGAs from “the trenches”
 - The Rev. Dwight Helt, Rector St. John’s Episcopal Church Norman, OK



State Street

- Review of CGA’s from State Street Global Advisors
 - Joanne Pipkin, Principal Team Leader, SSgA- CAM



Discussion & 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

- **Basics of Parish Finance**
 - February 5, 2014 – 7:00 PM – 8:00 PM Eastern Time
- **Year Round Stewardship- *Talking About Money When You're Not Asking for It***
 - February 11, 2014 – 7:00 PM – 8:00 PM Eastern Time
- **Basics of Endowments**
 - March 6, 2014 (new) – 7:00 PM – 8:00 PM Eastern Time
- **Capital Campaign for Debt**
 - March 12, 2014 – 7:00 PM – 8:00 PM Eastern Time

Check our website, under
Events, for more info.



At your service

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

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