



Using the tools of ECF's PLANNED GIVING on DEMAND

Jim Murphy, Managing Program Director

September 2, 2015

Webinar

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

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.



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



Types of Gifts

- **Ordinary** - Annual Stewardship/Annual Giving
 - Funds contributed toward on-going daily ministry and operation of a congregation.
- **Extra-Ordinary** - Capital Campaign
 - Special funds raised for a specific need, typically for new or enhanced facilities.
- **Ultimate** - Planned Giving
 - Gifts to support the future ministry and security of a parish and its mission.

Promoting Planned Giving and how *Planned Giving on Demand* helps



For all levels of a PG program:

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





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**





Starting PG in your parishyesterday!

- Choose a PG Shepherd
- View the 'quick start' article
- View a 'Basic' webinar
- **Contact ECF to create/review
Endowment & Gift Acceptance
Policies**



PLANNED GIVING ON DEMAND

Planned giving is vital to any faith community. Not only because it can ensure the future, but also because it gives people the opportunity to make a final testament about the importance of their Christian faith.

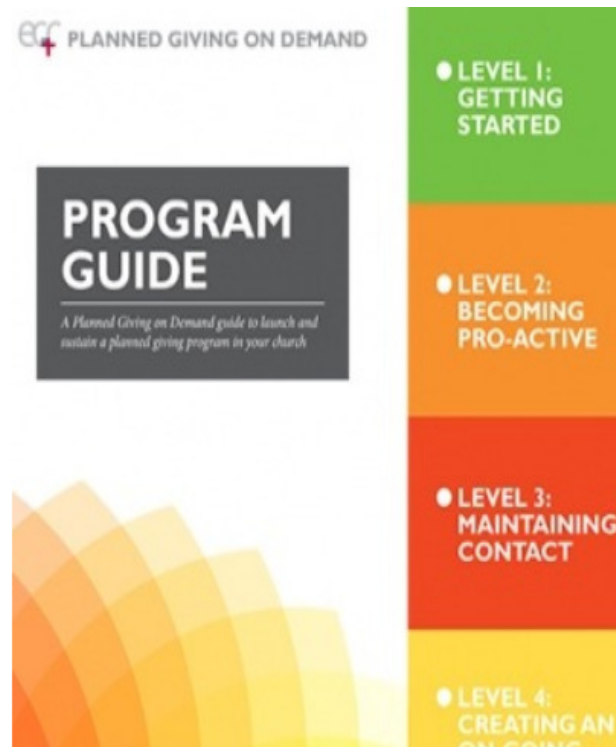
ECF can help you establish, enhance, and sustain an effective planned giving program. In addition to the web-based and print resources listed below, ECF's planned giving services also include life income gift administration and on- and off-site consultation. For more information, you can contact Meg King, Assistant Program Director [by email](#) or call 800-697-2858.

[Please sign up to be a Planned Giving Shepherd here.](#) By becoming a Planned Giving Shepherd you join ECF's new national network of planned giving leaders in parishes and Episcopal institutions across the Episcopal Church! Planned Giving Shepherds will be invited to special private and interactive webinars, as well as be invited to join a new LinkedIn group where you can post questions, share ideas and connect directly with other leaders in your area and throughout the Episcopal Church.

YOUR RESOURCES

[Planned Giving on Demand Program Guide](#)

A step by step guide to implementing planned giving in your congregation, including 5



CONTACT US

[Meg King](#)
Assistant Program Director
800-697-2858

RESOURCES

YOUR RESOURCES

[Planned Giving on Demand Program Guide](#)

A step by step guide to implementing planned giving in your congregation, including 5 phases of launching, and sustaining, a successful planned giving program (includes sample timelines). Resources are hyper-linked throughout the document for easy-access.

[Funding Future Ministry](#)

Link to all the resources related to this comprehensive manual which provides clergy and lay leaders with the most effective ways to encourage planned gifts, all set in a theological framework. To purchase a print copy, [contact Forward Movement](#). For the e-book version for your Kindle or other device, please visit [Amazon.com](#). A [table of contents can be found here](#); a sample chapter, Caring for Givers, [can be found here](#).

[Starting a Planned Giving Program from Scratch](#)

Quick start article by Jim Murphy, ECF Managing Program Director.

[Planned Giving Brochures & Booklets](#)

ECF's series of planned giving brochures present the basics of planned giving, the how and why, as well as the different kinds of gifts that are possible. All are available for free download, or can be purchased through [Forward Movement](#). ECF's planned giving booklets explain in depth how planned gifts work, and provide instructions and application forms to make a charitable gift or bequest.

[Web Conference Recordings](#)

A number of previous web conference videos are available for viewing on [ECF Vital Practices here](#).

Web Conference Recordings

A number of previous web conference videos are available for viewing on [ECF Vital Practices here](#).

- [Basics of Planned Giving for Congregational Leaders](#) (March 2015)
- [Making a Planned Gift to Benefit Your Congregation](#) (for donors) (June 2013)
- [Legacy Societies and Your Planned Giving Ministry](#) (June 2015)
- [Legacy Societies and Your Planned Giving Ministry](#) (July 2013)
- [Basics of Endowments](#) (October 2014)
- [Endowment Spending Rules](#) (April 2015)
- [Why Endowment Structure Matters](#) (April 2014)
- [The Opportunities of Charitable Remainder Trusts](#) (April 2014)
- [Charitable Gift Annuities: 2013 Success and Plan](#) (February 2014)
- [Basics of Parish Finance](#) (February 2014)
- [Basics of a Capital Campaign](#) (May 2014)

Web Conferences

ECF offers a wide range of web conferences designed to help congregations develop their leadership and financial resources. There is no cost to participate and all lay and clergy leaders are welcome. Some upcoming topics include vestry leadership, endowment structure, basics of planned giving, and basics of a capital campaign. You can review a list of upcoming web conferences and register [here](#).

ECF Planned Giving Website

ECF's Planned Giving Website for potential donors and planned giving leaders includes descriptions of planned gifts, the ability to run life income gift illustrations, news, and much more.

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.

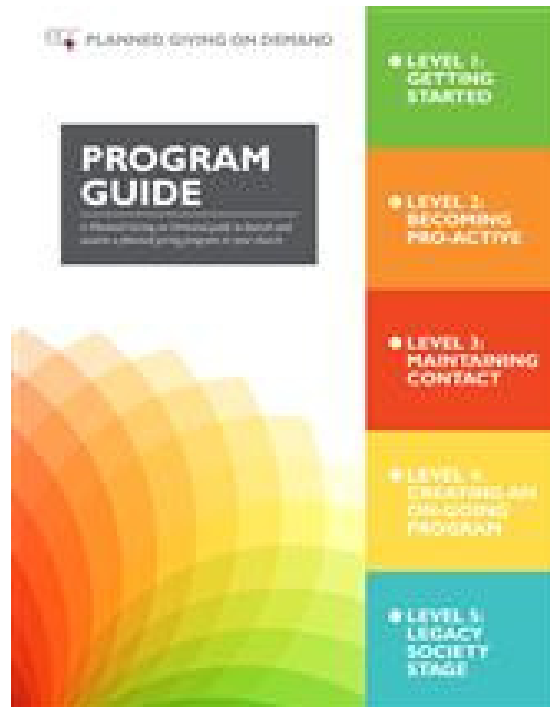
Empowered and appropriate leaders are essential for success in every ministry. Your planned giving ministry is no different. Here are some things to keep in mind:

- 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.

Step by Step



Use the *Planned Giving on Demand* on-line Program Guide

- Start out simple, and follow the steps in the Guide and the document's hyperlinks
- Use webinars to teach PG Shepherd, other volunteers and donors
- **Contact ECF to create/review Endowment & Gift Acceptance Policies**



● LEVEL I: GETTING STARTED

This level is appropriate for congregations that are just beginning a Planned Giving (PG) effort.

Although the suggestions below are passive, they may well produce gifts by simply raising awareness.

ECF Resources for Level I:

- **Book:** *Funding Future Ministry*
- **Article:** *Starting Planned Giving from Scratch*
- **Brochure:** *Planned Giving: Stewards of God's Bounty*
- **Booklet:** *Planning for the End of Life*
- **PG Brochure & Booklet Series:** *ECF Planned Giving Brochures and Booklets*
- **Webinars:** *Basics of Planned Giving*

● LEVEL 5: LEGACY SOCIETY STAGE

12-month planned giving program

This level is for congregations that are ready to educate the parish 1-2 times per year on end of life planning and which have enough volunteers to share leadership of the PG Committee and Legacy Society.

ECF Resources for Level 5:

- **Book:** *Funding Future Ministry**
- **Brochures:** *Pooled Income Fund*
Charitable Gift Annuity
Charitable Remainder Trusts
- **PG Brochure & Booklet Series:** *ECF Planned Giving Brochures and Booklets*
- **Webinars:** *Endowment Spending Rules*

Make the Donor Webinar available on the congregation's website

Learn through webinars

Making a Planned Gift to Benefit Your Congregation

This webinar took place June 18, 2013, 7:00-8:00 PM EDT.

Join other parishioners just like you to learn more about planned giving options and how they can benefit both you and your congregation. Planned or legacy giving is an important aspect of your stewardship and can take many different forms such as a bequest in a will, charitable gift annuity, life insurance beneficiary and many other opportunities. Presented by Jim Murphy.

Watch a YouTube recording of the webinar below. The PowerPoint slides for this presentation are also available below.

The screenshot shows a webinar interface. At the top, the title "ECF Planned Giving Donor Webinar 61813" is displayed. The main content area features a slide titled "Life Income Gifts 101". On the left side of the slide is a portrait of a man in historical attire. To the right of the portrait, the text "Basic Characteristics of LIG's:" is followed by a bulleted list:

- Donor makes irrevocable gift
- Donor receives charitable deduction in the year of gift
- Donor receives income for life
- Remainder given to Parish or institution

A large play button icon is overlaid on the slide. In the bottom right corner of the slide, the "ecf" logo is visible. On the right side of the webinar window, there is a video feed of a man in a white shirt and tie, and a list of participants with their names and status.

Learn through webinars

WEBINARS

Basics of Planned Giving

This webinar took place on Monday, March 23, 2015. A recording of the presentation and the PowerPoint slides are available below.

This webinar focuses on the basics of planned giving, how it differs from annual stewardship and capital campaigns, how your parish can build endowment through life income gifts, and you will have a plan of action by the end of the web conference. We will also review ECF's new comprehensive resource Planned Giving on Demand.

Presented by Jim Murphy, Managing Program Director of Financial Resources at the Episcopal Church Foundation.

The screenshot shows a webinar interface. At the top, the title "Basics of Planned Giving 03.23.15" is displayed. The main content area features a slide titled "Life Income Gifts 101" with a sub-heading "Pooled Income Fund (PIF)". The slide includes a list of bullet points: "•Donor income varies based on fund performance", "•Current yield 2.89%", "•Minimum age: 50", "•Minimum gift \$2500", "•Donor may add gifts, \$1000 minimum", and "•No longer as popular". A large play button is overlaid on the slide. To the left of the slide is a video thumbnail showing a dog jumping into a pool. The ECF logo is visible in the bottom right corner of the slide. On the right side of the interface, there is a video feed of the presenter, Jim Murphy, and a list of participants.

Learn through webinars

WEBINARS

The Opportunities of Charitable Remainder Trusts

This webinar on opportunities of charitable remainder trusts features a conversation's with ECF's new legal counsel, Nancy Marx, and David Leibell, ECF's prior attorney in planned giving work.

Resources:

- Recording of the webinar presentation
- PowerPoint slides for webinar presentation
- Article "[Charitable Remainder Trusts are back!](#)"
- Memo on charitable remainder trusts



The screenshot shows a YouTube video player interface. The video title is "Charitable Remainder Trusts Opportunities 04 24 14". The main content is a slide titled "CRT Fundamentals Continued: Tax And Financial Advantages". The slide lists several bullet points:

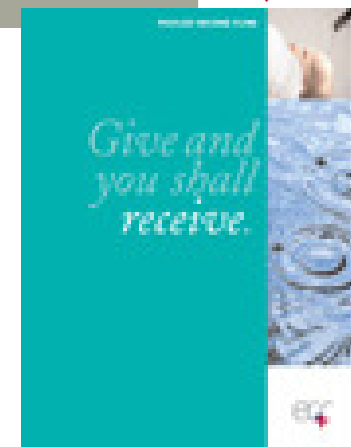
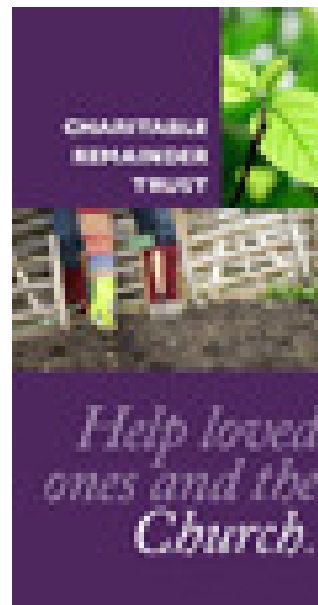
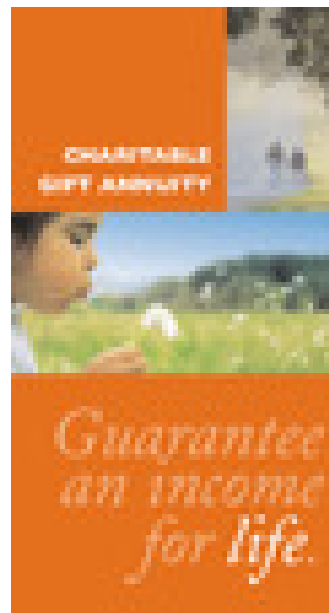
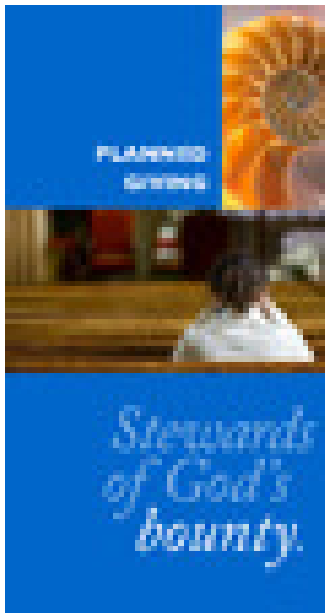
- Trust pays no income tax
- Tax-free diversification vehicle
- Grantor gets estate, gift and income tax deductions
- Increased cash flow
- Income deferral (NIMCRUT)
- Funding with illiquid assets (FLIPCRUT)

The slide also features a large play button icon and the ECF logo in the bottom right corner. The video player controls at the bottom show a progress bar at 0:00 / 1:05:51 and the YouTube logo.

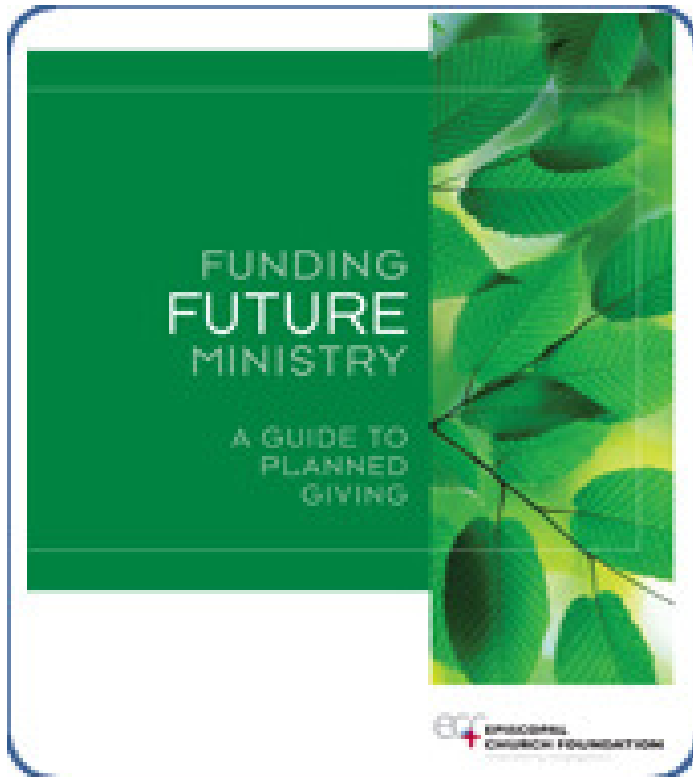


Use Printed Resources.....

- Get brochures, booklets and other resources



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 on line**



Use sample articles and letters.....

FUNDING FUTURE MINISTRY



TEMPLATE: Letter introducing planned giving program

For suggestions on how to use this type of letter in your planned giving program, see Funding Future Ministry Chapter VI Educating Your Congregation.

SECTION 1: INTRODUCTION: CAPTURE INTEREST WITH PERSONAL QUOTES AND EXAMPLES FROM YOUR PARISH

"St. Swithin's has been the spiritual center of our lives for years. We want to make a gift that will help the parish continue its mission and benefit generations to come.

But it sounds complicated! Where do we start?"

Use a quote from one of your parishioners if you can.

Dear [redacted],

Personalize using mail merge.

Perhaps you have had similar thoughts. Throughout your lifetime, you've given faithfully to the ministry of St. Swithin's. You have committed your annual pledge and participated in capital campaigns that met specific needs, such as the new parish center. Perhaps you've made a memorial gift



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.....



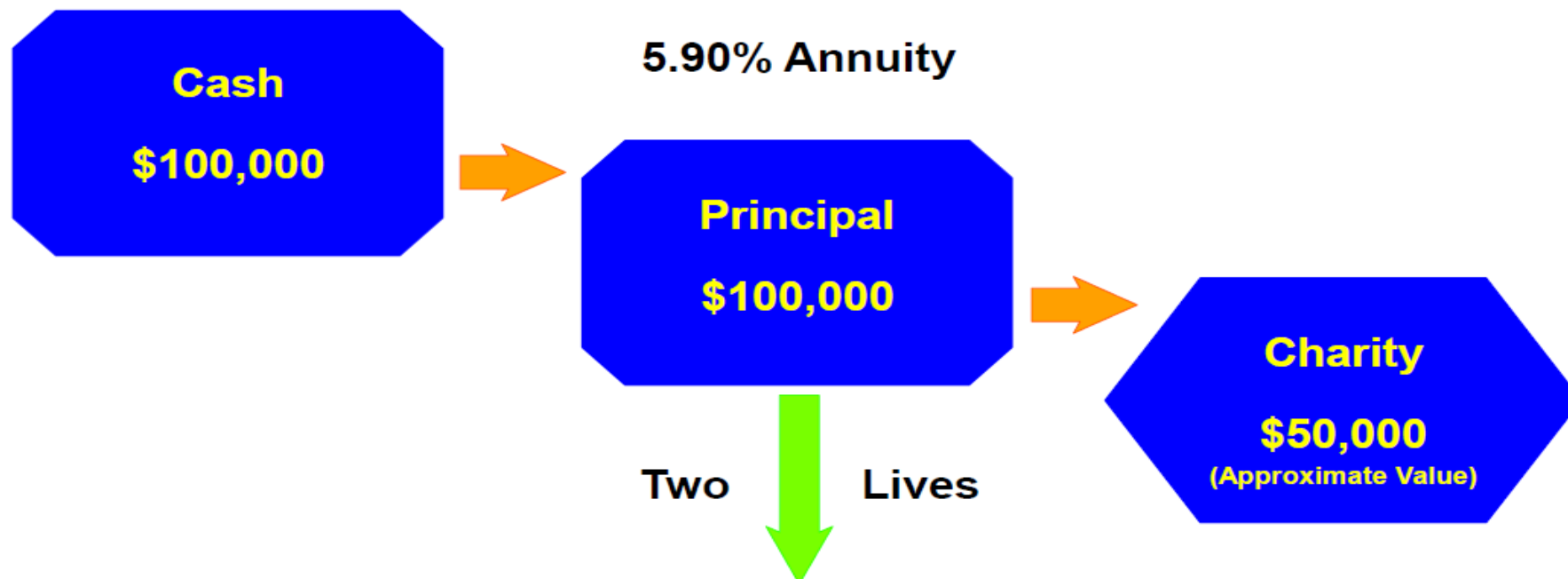
Other PG Resources from ECF remain available

- Publications directly through Forward Movement
 - Booklets & Brochures
 - *Funding Future Ministry*
- Life Income Gift Illustrations from ECF Staff
- ECF Sponsored Planned Giving Website for Donors:
www.episcopalgifts.org



Charitable Gift Annuity

Mr Smith - Age 82 Mrs Smith - Age 80



1. Gift property to charity. Donor receives contract for annuity payments. Income tax deduction of \$44,588 may save \$14,714.

2. Annuity of \$5,900.00 for two lives. Tax-free amount \$4,578.40. Estimated two lives payout of \$77,290. Effective payout rate 9.6%.

3. Quarterly payments for two lives. Property passes to charity with no probate fees. There are also no estate taxes, if married.

www.episcopalgifts.org

Gift Options



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.



Donor Stories

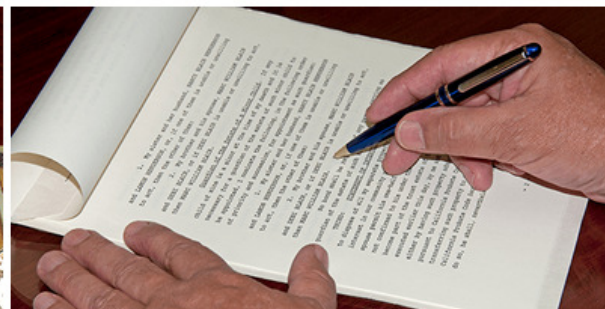
Learn how others have made an impact through their acts of giving to your preferred Episcopal charity or parish and others. Explore the many benefits of charitable gift planning.

[More](#)



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

Join the movement!

Become a PG Shepherd

- National network of planned giving volunteers and professionals
- New opportunities for advanced learning in 2016
- Stay connected with others through future on-line forums and interactive webinars





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

- **Vestries: The Next Six Months**
 - September 10, 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, under Events, for more info.



At your service

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

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