

KEYS TO BUILDING A SUCCESSFUL AND SUSTAINABLE PLANNED GIVING PROGRAM

Ministry and Money

Rocky Mountain Conference, UCC
First Plymouth Congregational – Englewood, Colorado

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DEFINITIONS



Planned Gifts

Transfers of assets that, in addition to having a charitable dimension, are made in the context of a long-term financial or estate plan.

Deferred Gifts

Gifts where impact is not fully realized until some future date, generally at the death of the donor(s).

Life Income Gifts

Irrevocable transfers of assets creating vehicles whereby donors receive income for themselves or their designees, favorable tax treatment and provide support from their assets to a charity of their choice.



DEFERRED GIFTS

- Bequests
 - Gifts made through a Will or Trust
- Life Insurance
 - Whole Life, Group and Term
- Retirement Assets
 - Beneficiary and Outright Vehicles
- Donor Advised Funds



LIFE INCOME GIFTS



- Charitable Gift Annuity
- Charitable Remainder Trusts
 - Annuity Trust, Unitrust
- Charitable Lead Trusts
 - Grantor, Non-Grantor; Annuity and Unitrust
- Pooled Income Funds



Charitable Gift Annuity Illustration

Annuitant	65
Date of Gift	1/10/2019
Cash Donated	\$20,000.00
Payout Rate from ACGA2018 Table	5.1%
Payment Schedule	quarterly at end

CALCULATIONS:

Charitable Deduction	\$7,359.20
Number of Payments in First Year	3
Annuity	\$1,020.00
Quarterly Payment	\$255.00

BREAKDOWN OF ANNUITY:

	Tax-free Portion	Ordinary Income	Total Annuity
2019 to 2019	476.59	288.41	765.00
2020 to 2038	635.46	384.54	1,020.00
2039 to 2039	90.47	929.53	1,020.00
2040 onward	0.00	1,020.00	1,020.00



BUILDING YOUR PLANNED GIVING PROGRAM



- Craft and Make the Case
- Choose and Equip Leaders
 - Determine the Role of the Pastor
 - Expect and Model Financial Commitment
- Build Infrastructure
 - Develop Endowment, Investment and Recognition Policies

BUILDING YOUR PLANNED GIVING PROGRAM

- Listen to and Know your Prospects
 - Stay in Feasibility Mode
 - Understand How Donors Give
 - Make Decisions about Recognition
- Cultivate and Educate
 - Think and Act for the Long Term
 - Provide Resources to Prospects and Donors



MAKING THE CASE

- **Values** – The immutable principles that animate our community's life
- **Vision** – Definition of success in mission
- **Outcomes** – Our specific impact as part of the vision
- **Strategy** – How we make it happen
- **Testimonials** – The stories of our success
- **The Ask** – Unapologetic and tailored



PLANNED GIVING LEADERSHIP



- Commitment
- Theological Grounding
- Basic Knowledge of Legacy Giving
- Connection with Stewardship and Trustees



CHALLENGES

- Changing views of legacy
- The changing landscape for the church
- New understanding of stewardship
- Articulating a compelling vision in a competitive environment



RESPONSES TO FUNDRAISING CHALLENGE

- A Comprehensive Range of Gifting Options
 - Consolidated Campaigns?
- New Engagement and Recognition Strategies
- Emphasis on Ministry Outcomes/Impact rather than Institutional Health
- Transparency
- A Compelling Case for Support



FAITHFUL STEWARDSHIP

- When we consider our children and grandchildren, what principles would we like to communicate to them?
- How does our giving represent what is important to us and our family? How does our giving relate to discipleship?
- What institutions, organizations and people have been most important in our life? How has the Church in particular been impactful for our life and community?
- What values do we hope that our money will promote in our family and your community? What is God calling us to be and do?
- Which of our past gifts have given us the most satisfaction?
- How will our estate giving bear witness to God's generosity?



RESOURCES



Wealth in Families, Charles Collier

Not Your Parent's Offering Plate, J. Clif
Christopher

www.irs.gov

Planned Giving Design Center —
www.pgdc.com

United Church Funds —
www.unitedchurchfunds.org



Planned Giving Microsite

God is still speaking.
UNITED CHURCH OF CHRIST

What is Planned Giving? Why Give Testimonials Let's Talk Contact

← BACK TO MAIN SITE

RAISE YOUR HANDS!

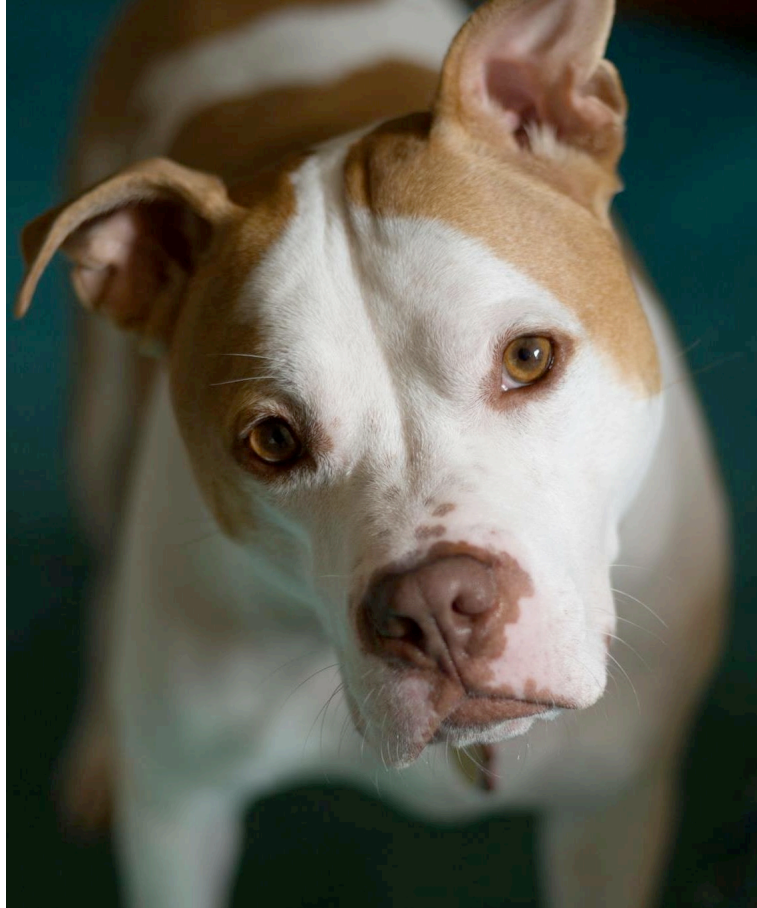
Are you considering a planned gift, or just curious about the possibilities? Raise your hand to start a confidential, no-obligation conversation.

LET'S TALK

QUICK CONTACT

<http://www.ucfmicrosites.com/>

CONTACTS



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