WHY YOUR CHURCH NEEDS A PLANNED GIVING PROGRAM

UNITED CHURCH FUNDS

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What is Planned Giving?

Planned Gifts

Transfers of assets that, in addition to having a charitable dimension, impact financial planning and/or estate planning impacts.

Deferred Gifts

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.

Why Planned Giving?

- Encourage faithfulness in stewardship by individuals and families
- Ensure sustainability of ministry and mission
- Diversify income / provide for contingencies
- Expand horizons for mission

The Estate Planning Context

- Choose guardians for minor children
- Choose plan for distribution of assets
- Protect beneficiaries and the assets you leave them
- Plan for disability/incapacity
- Minimize taxes and other costs
- Make charitable gifts

Faithful Stewardship - Questions

- 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?

Congregational Financial Health

- Predictable financial resources from a diversity of sources
  - Sufficient to meet yearly operating expenses
  - Provide stability during financial turbulence
  - Meet capital needs
  - Allow for an expansive view of ministry

Challenges

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

Questions?

Send questions about the topic of this webinar to:

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Contact Us

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