



PLANNED GIVING SUPPORT

How can ECF help you with your planned giving program:

***For questions or more information, please contact our Planned Giving staff:
By E-mail: Giving@EpiscopalFoundation.org By Phone: 1 (800) 697-2858.***

□ 1. Initial Telephone Consultation

ECF will talk with your Planned Giving Committee, or other leaders, by phone to review what you are now doing, planning to do, or could be doing, with regard to creating or expanding a planned giving program in your parish. **FREE**

□ 2. Weblink and E-Newsletter

We can provide a link for your church's website that takes the viewer directly to ECF's donor website where there is detailed information about planned giving including personalized illustrations for specific types of gifts, such as charitable gift annuities. Please contact us for web address and more information. **FREE**

You can also sign up any number of individuals to receive one of two free e-mail newsletters, for Planned Giving leader or Donors that provides helpful information on gift planning, financial planning and related topics. Anyone placed on the list can choose to cancel this newsletter at any time. **FREE**

□ 3. Endowment Tools

ECF can provide documents to assist you in structuring endowment policies. **FREE**

ECF also provides investment services for endowment funds, and capital campaign services designed to raise funds only for endowment. **Please call ECF for details.**

□ 4. Printed Materials

The following brochures and booklets can be ordered through our website (under resource library) from Forward Movement. The brochures and booklets can also be downloaded free from our website. www.episcopalfoundation.org/resource-library

A. Brochures (five different)

These fit into a #10 envelope for a mailing, or can be placed in a tract rack.

(1) Planned Giving: Stewards of God's Bounty	25 / \$12.95
(2) Charitable Gift Annuity: Guarantee an Income for Life	10 / \$4.25
(3) Charitable Remainder Trust: Help Loved Ones and the Church	10 / \$4.25
(4) Pooled Income Fund: Give and You Shall Receive	10 / \$4.25
(5) Writing Your Will: Where There's a Will, There's a Way	10 / \$4.25

B. Booklets (five different)

These are 8 ½ x 11 inch booklets that provide more detailed information than the brochures, including various useful forms. These would be used as follow-up from donor inquiries, or during one-on-one presentations or in small group settings.

(1) Planned Giving: Stewards of God's Bounty \$10.00	\$1.50 each or 10 / \$10.00
(2) Planning for the End of Life: Faithful Stewards of Your Good Gifts \$15.00	\$5.00 each or 5 / \$15.00
(3) Charitable Gift Annuity: Guarantee an Income for Life \$10.00	\$3.00 each or 5 / \$10.00
(4) Charitable Remainder Trust: Help Your Loved Ones and the Church \$10.00	\$3.00 each or 5 / \$10.00
(5) Pooled Income Fund: Give and You Shall Receive \$10.00	\$3.00 each or 5 / \$10.00

A good way to get started would be to order the minimum quantity of each of the brochures to place in the church; then order a larger quantity of the overview brochure (Planned Giving: Stewards of God's Bounty) to use in a mailing to a selected group of church members. You will need to place a sticker on the back of each if you want the response to come back to you directly. A second mailing might feature the charitable gift annuity, a third the Will brochure.

You could also order several sample sets of the booklets to have on hand.

C. **Funding Future Ministry: A Guide to Planned Giving**

This newly revised, updated, and comprehensive manual from ECF ensures that clergy and lay leaders know the most effective ways to encourage legacy gifts, all set in a theological framework. **\$15 per copy.**

□ **5. Legacy Society Materials**

An overview of the “why and how” of starting a legacy society at your church. **FREE**

□ **6. Donor Consultations**

ECF staff will work directly with a donor interested in making a Life Income Gift to your congregation, by phone and e-mail, explaining the various gift options and answering questions. **FREE**

For donors interested in creating a Charitable Remainder Trust, Charitable Lead Trust, or another complex planned gift, our attorney will prepare appropriate documents, at no charge, for the donor’s attorney to review. **FREE**

□ **7. Life Income Gift Administration**

ECF is certified to offer planned gifts in all 50 states, which means your church can offer top quality charitable asset management to interested donors today. ECF partners with State Street Global Advisors to invest and manage these gifts – such as a charitable gift annuity or a charitable remainder trust. ECF offers much of this service at not cost to your ministry. **FOR MORE DETAILS, PLEASE CONTACT ECF DIRECTLY**

□ **8. Donor Workshops**

ECF also offers planned giving training sessions for individuals and small groups online, via webinar.

Pre-scheduled national access webinars: **FREE** (Sign up on our website)

Basics of Planned Giving Webinar (Single parish or entity): **\$150**

Advanced Planned Giving Webinar (Single Parish or entity): **\$150**

ECF will present a *Wills Awareness Workshop*, an *End of Life Planning Session*, or a *Planned Giving Overview* for a group at your parish. Format can be customized to meet your needs. **\$750/DAY PLUS TRAVEL EXPENSES.**

□ **9. In-Depth Planning Consultation**

ECF will spend a day with your committee covering all aspects of a planned giving program, concluding with a detailed timeline and budget. **\$750/ DAY PLUS TRAVEL EXPENSES**

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