



A Plan for Legacy Giving

Building a Legacy Giving Program
for your Camp & Conference Center

Presbyterian Foundation

Bringing People and Mission Together

*A vital part of the Presbyterian Church (U.S.A.), the Presbyterian Foundation **gathers, stewards, and distributes** funds to serve Christ's mission.*

Established in 1799

Ministry Relations Officer

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“Three Pockets”

Three pockets everyone can give from:

1. Annual
 - Disposable income for your annual campaign
2. Capital
 - People make adjustments to stretch their disposable income in order to make a capital gift
 - Come into large sums of money (inheritance, sale of business, etc.)
3. Planned
 - Wills/Bequests, Life Income Plans, Retirement Plan giving, etc.

How do we talk about legacy giving?

- People DON'T want to be told to make a will
- People DO want to hear about your camp and conference center *and* the potential impact a bequest can have on your future ministry
- There is a pastoral care component to this work

What are the most common planned gifts?

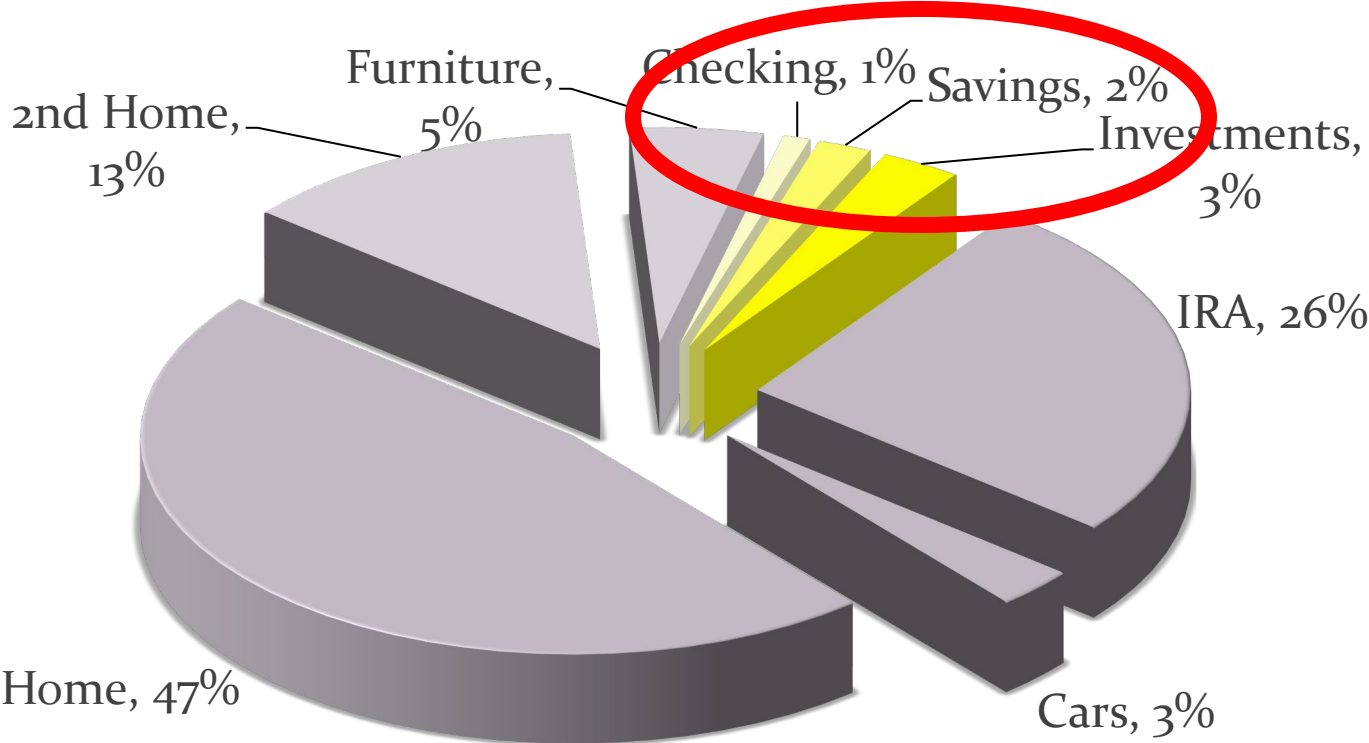
- Bequests...68%
- Beneficiary of an IRA...30%
- Insurance policy beneficiary...19%
- Charitable Trust beneficiary...19%
- Donor Advised Funds...growing trend...

Most people make planned gifts...to places they already support

- 78% of planned gifts go to places donors have supported for over 20 years.
- You already have a pool of people who could make a planned gift!

Planned Giving

What is it?



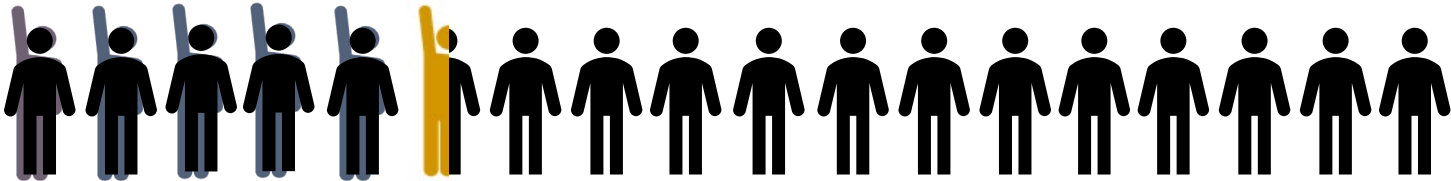
Planned Giving

What is it?

For the donor,
it is often the
greatest gift
they will ever
make.

A planned gift is typically **2.5x** the donor's
lifetime annual giving

Un-tapped



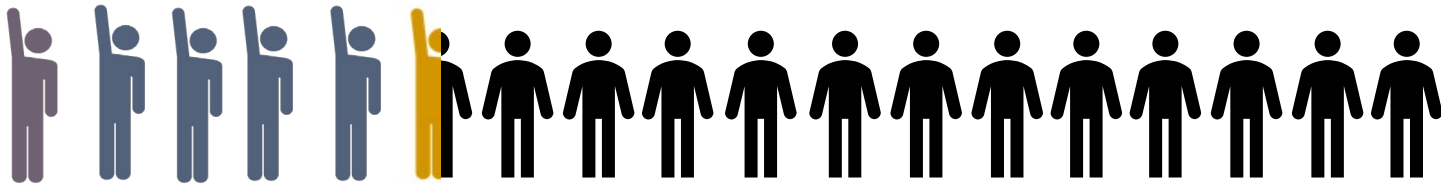
5%

leave a bequest

28%

would leave a bequest
If asked or reminded

Un-tapped



Actual
Bequests

Un-Tapped
Bequests X 5

Average Church
\$60,000

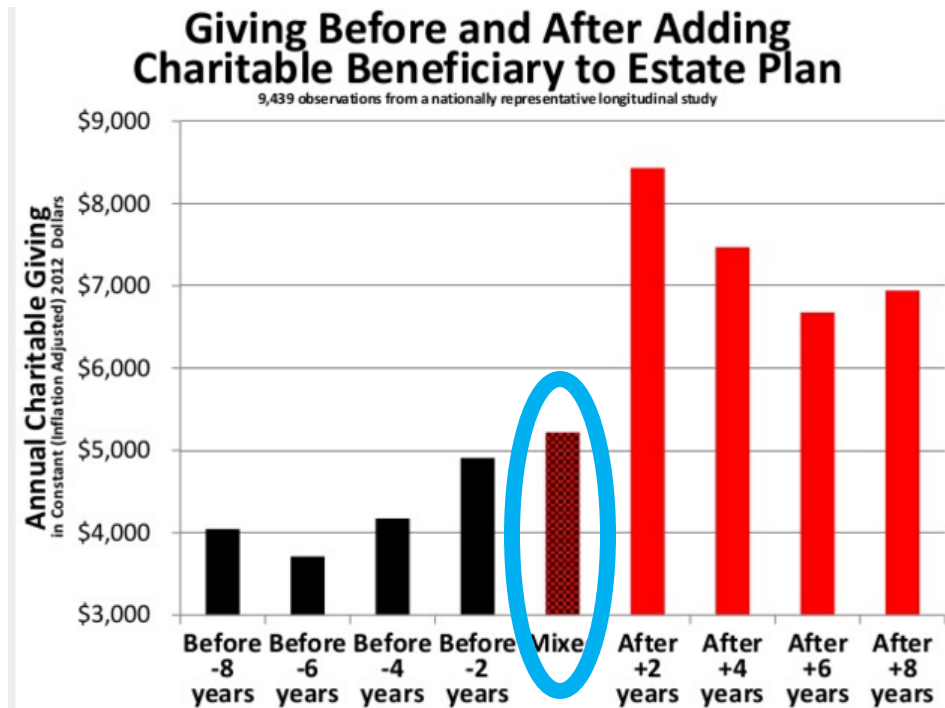
X (?)

Large Church
\$170,000

Who makes a planned gift

... during their lifetime	Open
Regular givers	Inclined
Regular volunteers	Favorably Inclined
Participate(d) in leadership	VERY Inclined
Spend life's most important moments here Someone visits your camp & conference center	Pillar

Planned Giving Impacts



10 Things to Do to (RE)FRAME Your Legacy Program



#1. Know why your donors give

- Donors want to give to things that **make an impact** (#1 overall)
- Donors want to know that the **leadership** can carry out the goal of the program
- Donors want to support programs that are **fiscally sound**

#2. Tell stories that inspire, not scare

- Shaming or guiltting donors can lead to smaller and fewer gifts
- Lead with stories of how you are making a difference in people's lives
- When a donor gives to your camp and conference center's legacy program, they are funding your ministry for generations to come

#2.1 Tell stories that inspire, not scare

No one wants to leave their estate to this...



#2.2 Tell stories that inspire, not scare

- Generosity is a spiritual discipline – we grow as disciples by imitating Christ’s example of generosity
- Generosity inspires generosity
- Your legacy program should tell a story that inspires people to give

#3. Balance your budget

- Donors are less inclined to give to ministries that are not financially sustainable



#4. Build your endowment

Craft a budget that doesn't draw down the endowment




#5. Put the right policies in place

Policies can be boring, but you need good policies. Have them in writing and use them.

- **Spending Policy** – how the income will be used
- **Investment Policy** – how the funds are managed
- **Gift Acceptance Policy** – how gifts are received


Thankfully, you don't have to reinvent the wheel!

StewardshipNavigator.com



- Home
- Annual Campaign
- Narrative Budget Builder
- Stewardship Kit
- Planned Giving**
- Web pages
- Brochures
- Document Storage
- Log Out

Your Ministry Relations Officer (MRO)



Dana Waters

Contact Me

Presbyterian FOUNDATION

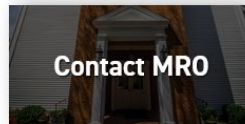
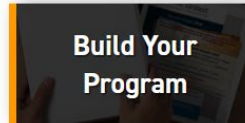
Planned Giving



Legacy Giving Program

A Legacy Giving Program encourages giving through charitable bequests, permanent endowment funds, and other estate planning tools enabling your members to share God's material gifts with the church and help fund mission for generations to come.

Site Features



Download the Manual



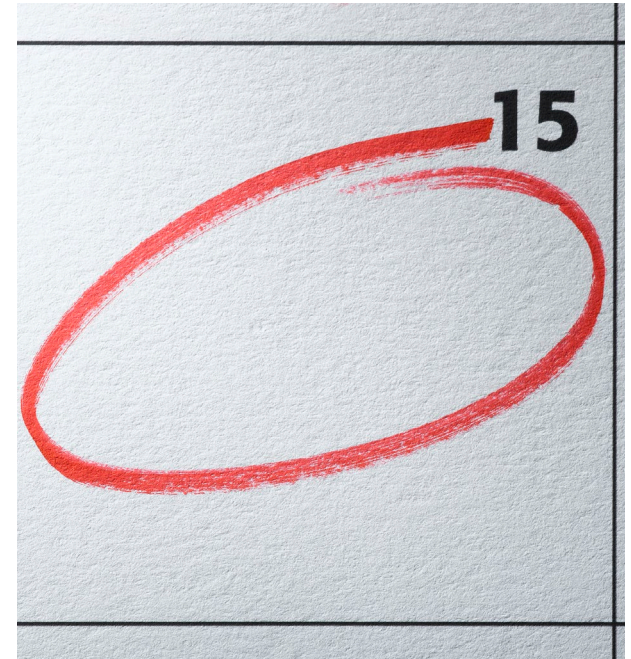
Planned Giving Guidebook

#6. You cannot overcommunicate

- Tell personal impact stories every time you talk about:
 - budget
 - money
 - legacy
 - endowments

#7. Do something

- Perfect is the enemy of good
- Start small – the key is to start!
- Put 3 or 4 dates on the calendar



#8. Start with these things first

- Create a decision-making group (you need a team)
- Define your funds (capital, program, etc.)
- Create your investment and spending policies
- Start a legacy society
- Promote on a regular and recurring basis
- Say “thank you” early and often
- Call on your Ministry Relations Officer



#9. Seriously, you cannot overcommunicate

- Use the **12-4-2-1** rule for Planned Giving
 - **12** monthly blurbs
 - **4** newsletter articles
 - **2** announcements
 - **1** Legacy Event (winter/spring)

#9.1 Seriously, you cannot overcommunicate

- Invite donors to let you know about their legacy plans
 - “I have remembered the camp and conference center in my estate plans.”
 - “I would like more information about the leaving the camp in my estate plans.”

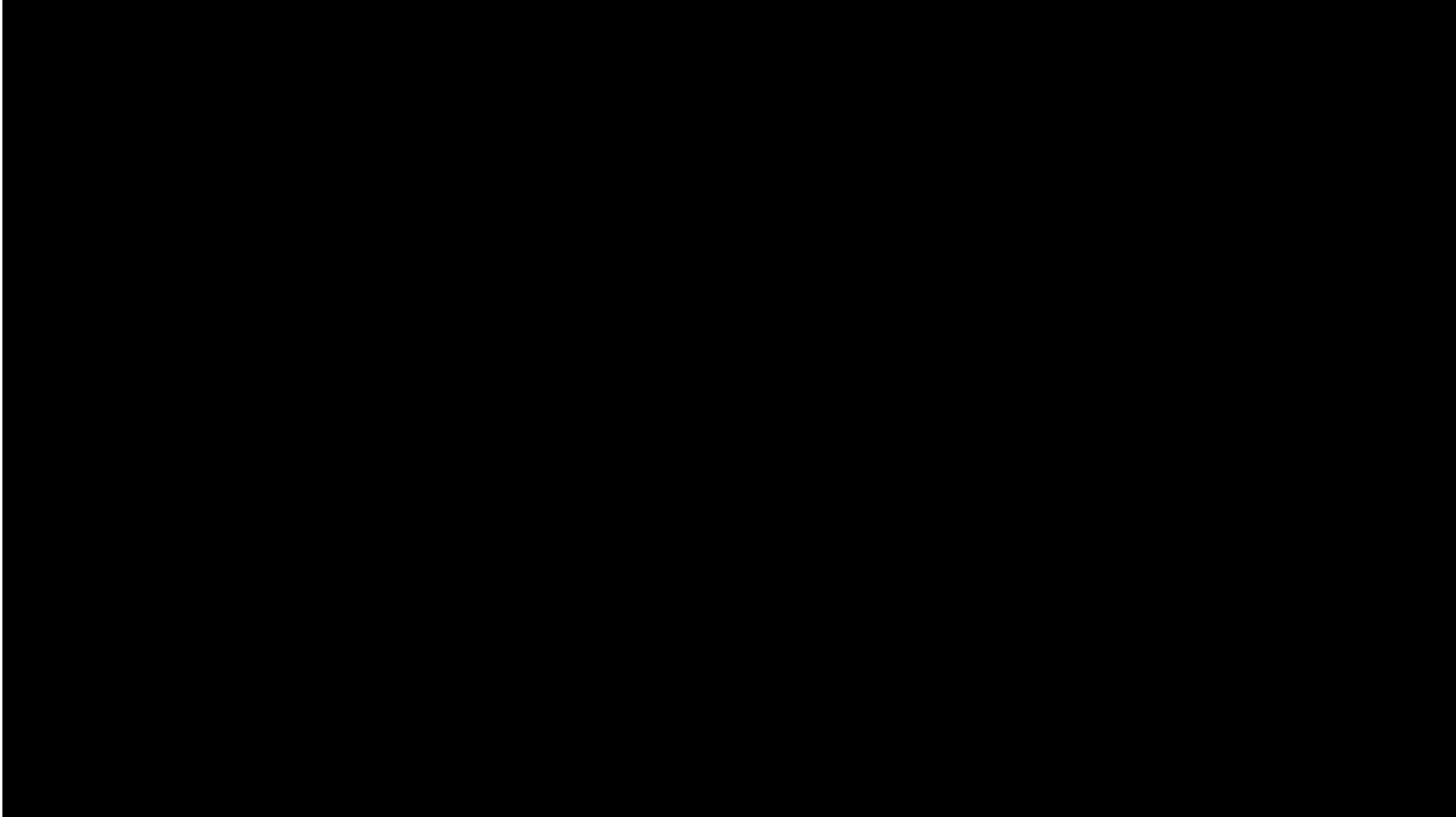
#10. Motivate like Jesus

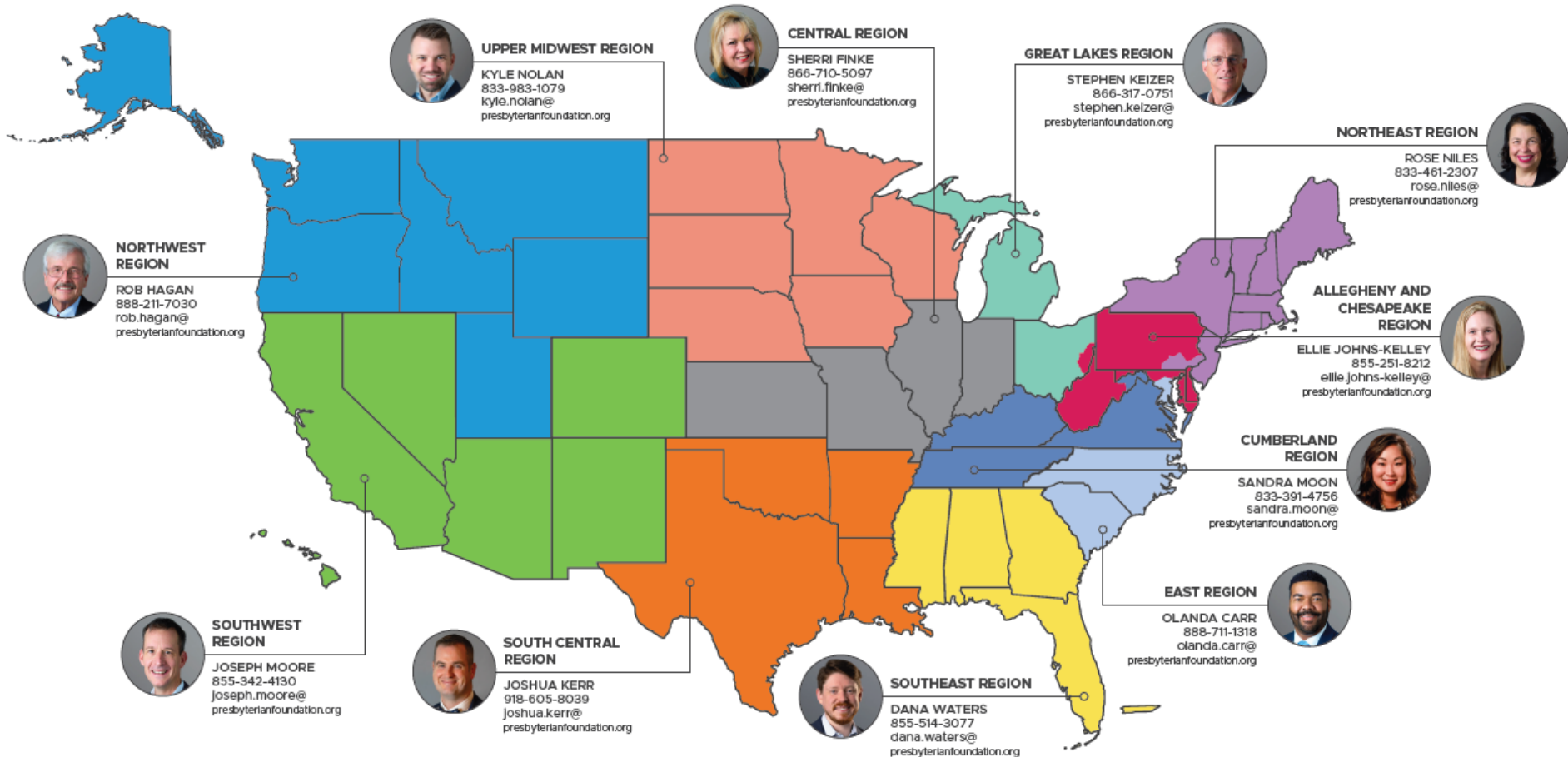
- What motivates people?
 - Anger
 - Anxiety
 - Awe

- “We are in the business of awe.”
 - (*Contagious* by Jonah Berger)

#10.1 Motivate like Jesus

- “Awe came upon everyone, because many wonders and signs were being done by the apostles.”
 - Acts 2:43





Ministry Relations Officers



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