

*Welcome to:*  
***ENCOURAGING MORE  
ESTATE GIFTS!***



**By Mark Filips**

and



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**Webinar will start Wednesday, Sept 3 at 2 PM, CDT.**

# SET-UP

- 1. If you've opened and shut the Launcher, and are trying to open again, you may need to Re-Launch. To Re-Launch you will need to:**
  - 1) go to the GoToWebinar box, 2) under Questions, click on “[launch GoToWebinar again](#)” and 3) open the GoToWebinar Launcher again.**
- 2. Set your audio to desired levels.**
- 3. In your toolbar under Webcam, you may move my webcam picture to the top or side or...**
- 4. In your toolbar under Zoom, you may enlarge or reduce your screen.**
- 5. Clicking on the small double-lines below my webcam picture can change the size of the webcam picture and slides.**
- 6. Questions may be typed in control panel and answers will be given at the end of the webinar, as time allows.**
- 7. Powerpoint and Webinar video link will be sent to you after the webinar.**





**To offer churches and schools strategies  
in encouraging estate gifts right now**





## **SOME FACTS:**

- \* \$41-136T transferred in next 50 years**
- \* Some churches and denominations funded largely by estate gifts**
- \* 4 of 5 wealthy people leave no gifts to charity**
- \* Only 15% of churches received estate gifts last year**





## **SOME FACTS:**

- \* Ditch the jargon - Estate Gifts, not Planned Giving**
- \* A church or school can only receive a gift through a will**
- \* 50% of people don't have wills**



# SO, WHAT CAN WE DO TO ENCOURAGE ESTATE GIFTS?





# **1. LEGAL NAME(S) IN ALL YOUR COMMUNICATIONS**

- \* Church, school, endowment...**
- \* Standing box**
- \* With estate thought**



# 2. ESTATE PLANNING WORKSHOPS



- \* Invites to all church members
- \* Refreshments
- \* Pastor, principal, accountant, lawyer, financial rep
- \* Pastor or principal opens and closes
- \* Pastor or principal makes case for church or school at the end







## **3. EASY THOUGHT:**

- \* Think of church as one of your children**
- \* If you have three kids, think of church as your fourth**



# 4. PREACH ESTATE BEQUEST WEEKEND!

- \* At end of stewardship renewal
- \* Time in prayer, talent in ministry & involvement, treasure in **INCOME (Now) and ASSETS (Later)**
- \* Most people afraid of outliving income
- \* Estate Gift is good stewardship of assets



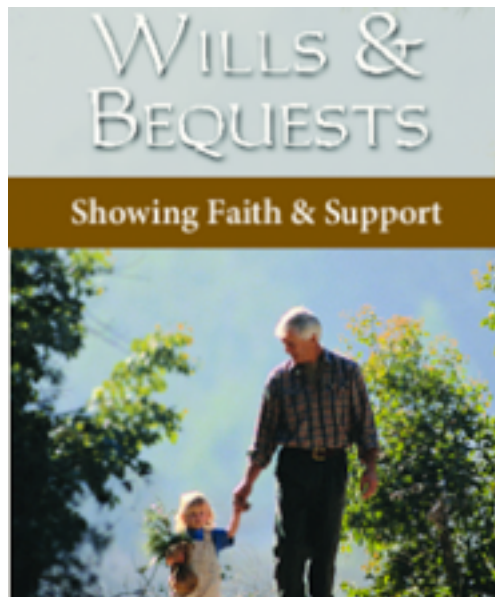


## **5. FORM A LEGACY SOCIETY**

- \* Return postcards to all who've left church or school in their will**
- \* Yearly lunches or dinners**
- \* Yearly thank yous**
- \* Publicize members**



# 6. MAIL OUT ESTATE BROCHURES



- \* Letter from pastor
- \* Legal titles mentioned
- \* Brochures with your logo
- \* Include postcard for those requesting more info





# 7. ANNOUNCE BEQUESTS

- \* **From pulpit**
- \* **At meetings**
- \* **In bulletins, newsletters, websites**



# 8. FIVE WAYS TO ACKNOWLEDGE

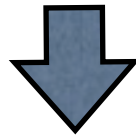


- \* Handwritten note to family
- \* Apply gift specifically, not to general fund
- \* Label gift - hymn books, pews, organ...
- \* Hold a dedication service
- \* Observe anniversaries - scholarships, grants...

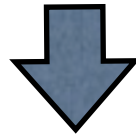


# WHO DOES ESTATE WORK?

**Pastor**



**Finance Committee**

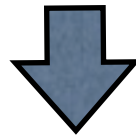


**Estate Planning Committee**



# WHO DOES ESTATE WORK?

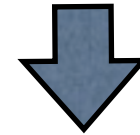
**Pastor**



**Staff Director**



**Office, Buildings/Grounds, Worship, Religious Ed, Development Director**



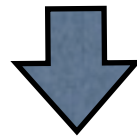
**ESTATE PLANNING**





# WHO DOES ESTATE WORK?

School Principal



Development Director



Annual Fund, **ESTATE PLANNING**, Major Gifts,  
Recruitment, Communications



# SUMMARY



- 1) Legal name all over**
- 2) Estate planning workshops**
- 3) Church as one of your children**
- 4) Bequest Weekend**



# SUMMARY



**5) Legacy Society**

**6) Mail out estate letters and brochures**

**7) Announce Bequests**

**8) Acknowledge Gifts**





- \* **Growing with a STRATEGIC PLAN!**
- \* **CAPITAL CAMPAIGNS: Do we need one? How much can we raise?**
- \* **Increasing the numbers of VOLUNTEERS and LEADERS!**



# ***THANK YOU FOR JOINING US TODAY!***

**MARK FILIPS  
AND THE VISIONWORKS TEAM**

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