



## PLANNED GIVING SUPPORT

Your church can look to ECF for support of its planned giving activities in a number of ways.

### 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

You can put a link on 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 a free e-mail newsletter 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. Printed Materials

The following brochures and booklets can be ordered through our website (under resource library) from the Episcopal Book and Resource Center. The brochures and booklets can also be downloaded free from our website. [www.episcopalchurch.org/resource-library](http://www.episcopalchurch.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) The Ministry of Planned Giving (overview)	25 / \$12.95
(2) Create a Charitable Gift Annuity	10 / \$4.25
(3) Establish a Trust	10 / \$4.25
(4) Participate in a Pooled Income Fund	10 / \$4.25
(5) Prepare to Write Your Will	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) Making a Planned Gift	\$1.50 each or 10 / \$10.00
(2) Planning for the End of Life	\$5.00 each or 5 / \$15.00
(3) Charitable Gift Annuities	\$3.00 each or 5 / \$10.00
(4) Charitable Remainder Trusts	\$3.00 each or 5 / \$10.00
(5) Pooled Income Fund	\$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 a larger quantity of the overview brochure (The Ministry of Planned Giving) 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 sampler sets of the booklets to have on hand.

***\*ECF staff will help you draft cover letters for the direct mailings\* FREE***

### 4. Legacy Society Materials

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

### 5. Donor Consultations

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

For donors interested in creating a life estate, a charitable remainder trust, or another complex planned gift, our attorney will prepare appropriate documents, at no charge, for the donor’s attorney to review. **FREE**

### 6. 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 CALL ECF DIRECTLY**

**7. Endowment Tools**

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

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

**8. Donor Workshops**

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. **\$500/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 time line and budget. **\$500/ DAY PLUS TRAVEL EXPENSES**

ECF also offers planned giving training sessions for small groups online, via webinar. **FREE**

**Please contact Jim Murphy, Associate Program Director, to access any of these services. By Email: [jmurphy@episcopalfoundation.org](mailto:jmurphy@episcopalfoundation.org) By Phone: 1 (800) 697-2858.**