

## PLANNED GIVING

# What It Is & What It's NOT



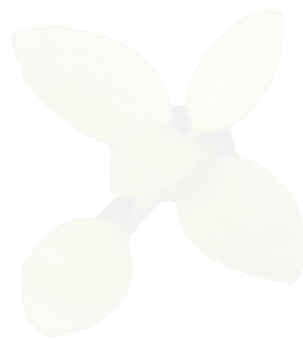
## PRESENTER



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## AGENDA

- Why You Should Consider Planned Giving
- Why You Should Care About Planned Giving
- What Planned Giving IS
- What Planned Giving is NOT
- How Planned Giving Helps



## WHY YOU SHOULD CONSIDER PLANNED GIVING

### *Isaiah 60:11*

**Your gates shall be open continually, day and night  
and they shall not be shut, that people may bring you  
the wealth of the nations.**

## WHY YOU SHOULD CARE ABOUT PLANNED GIVING

### Big Data for the Great Wealth Transfer -

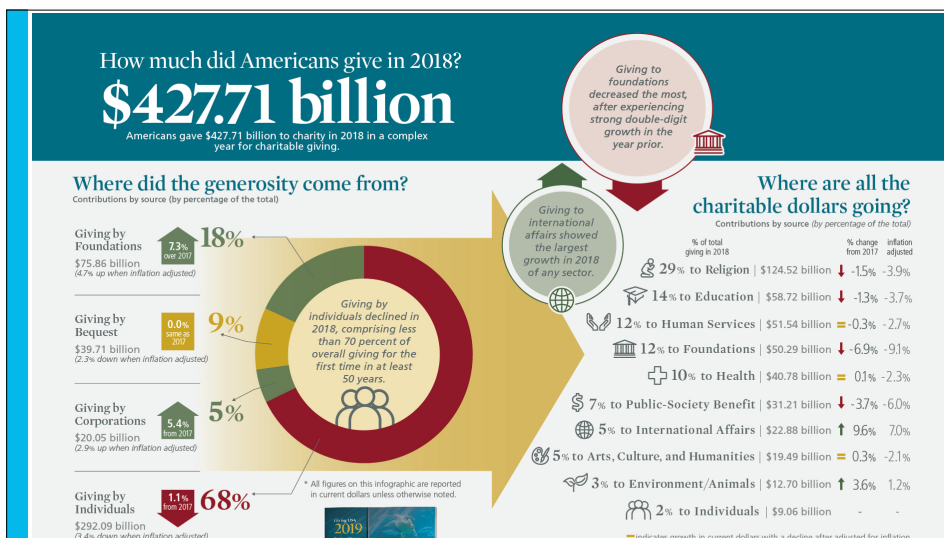
- ▶ \$68 trillion dollar wealth transfer is starting to happen now from Baby Boomers to Gen X & Millennials
- ▶ Bank of America found that 64% of wealthy individuals have not talked about how they plan to pass on their assets
- ▶ Baby boomers are 1/3 of the US population and give almost 50% of charitable giving.
- ▶ There are 22 million more millennials than Baby Boomers.



## WHY YOU SHOULD CARE ABOUT PLANNED GIVING

### Big Data on the Church -

- ▶ Your Top Givers make up less than 25% of your giving population but provide funding for over 60% of your annual budget
- ▶ Gen X givers only account for 20% of giving
- ▶ Millennial givers only account for 11% of giving



## WHY YOU SHOULD CARE ABOUT PLANNED GIVING

### What the Bible Says About Planned Giving



- ▶ Who made the first planned gift in the Bible?
  - ✓ David – 1 Chronicles 22 & 28: Solomon built the temple but David acquired the wealth for it and left a legacy gift.
- ▶ Everything is God's, right?
- ▶ Increase of the "Nones" (no known religious affiliation) – between 2007-2016, the unchurched in America jumped from 16-23%
  - ✓ That's 115 million 'churchless' people in America. How could more funding through planned giving help you reach these people?

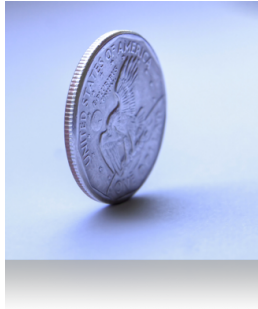


## WHAT IS PLANNED GIVING

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### Definition -

*Planned Giving is also referred to as gift planning or legacy giving. It enables the giver to make larger gifts to your church today and for the future.*



## WHAT IS PLANNED GIVING

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### 1. Stewardship

- a. Genesis 1:1 & 28
- b. Psalm 24:1

### 2. A Part of Stewardship Ministry

- a. Funding the local church
- b. Creating more opportunities for ministry to share the Gospel



## WHAT IS PLANNED GIVING

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### What Type of Ministry Handles Planned Giving?

- Generosity ministry but really you need another staff member that handles Planned Giving exclusively.
- Financial volunteers & a church staff leader that directs
- Form a committee to promote planned giving

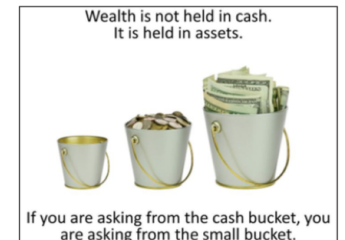


## WHAT IS PLANNED GIVING

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### What Planned Giving Does for the Church

- If you're asking for cash only, you're missing out! You're asking from the small bucket.
- Sustainable long-term funding
- Tax savings for the giver
- A typical planned gift is 200-300 times larger than the size of a giver's largest annual gift



## WHAT PLANNED GIVING IS NOT

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1. Only an end of life strategy
2. Only a tool for Non Profits and Higher Education
3. Not as scary as it seems



## WHAT PLANNED GIVING IS NOT

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### ***Who is Planned Giving for:***

- Age demographics of planned givers: 40 -70+ years old
- ✓ Any group receiving the wealth transfer inheritance from their aging relatives



## HOW DOES PLANNED GIVING HELP

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### ***It helps the Giver:***

1. Trade a Gift for Income / Transformational gift/legacy
2. Lower taxes for the giver

### ***It helps the Church:***

1. Receive a transformational gifts
2. Keep the doors open to continue reaching the least, the last, and the lost (*the Great Commission*)



## REMEMBER

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### ***Understand Our Place:***

***The Church is the engine driving the Great Commission  
The “giving” is the fuel for the engine to run!***



## THE SOLUTION

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***We know that this is just the tip of the iceberg, but don't worry we're here to support you.***

- › Our desire is for your ministry to be fully funded and provide more opportunities for people to experience the love of Christ.
- › We'll be hosting 4 additional webinars that will go into more detail about planned giving.
- › FREE customized Gift Planning report



## QUESTION & ANSWERS

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*Together, let's create a thriving and sustainable ministry!*

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