



PLANNED GIVING MINISTRY 101

PRESENTER



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AGENDA

- Traits of Successful Planned Giving Programs
- Where Are You In the Process – The Four Links of Kingdom Wealth
- How to Start a Program at Your Church
- Practical Resources for Educating Staff & Volunteers
- Q/A

RECAP

1. Why
2. What Planned Giving Is
3. What Planned Giving Is Not
4. Why Planned Giving Is Important for Your Givers
5. Why Planned Giving is Important for the Church

TRAITS OF SUCCESSFUL PLANNED GIVING PROGRAMS

2018 Stats - [forbes.com](https://www.forbes.com)

- **Harvard University** - \$9.6 Billion: \$3 Billion over their original goal.
- **United Way Worldwide** - \$3.92 Billion
- **Feeding America** - \$2.72 Billion
- **Americares Foundation** - \$2.38 Billion



TRAITS OF SUCCESSFUL PLANNED GIVING PROGRAMS

1. Focus: focused on the mission and goal

In a successful and healthy planned giving program, mission, values, and purpose are not just words on a plaque on a wall – they're alive every day.

Questions to Ask Yourself

1. Does your ministry have a clearly defined mission and vision?
2. Is this mission and vision shared with staff, volunteers, and givers?



TRAITS OF SUCCESSFUL PLANNED GIVING PROGRAMS

2. Giver - Centric: understand who their giver is and what they are passionate about.

Truly successful planned giving programs are giver-centric. High-capacity givers are driven by lifelong passions and goals and are more likely to consider a large gift if they can give towards an area of ministry that supports these desires.

Questions to Ask Yourself

1. Do you personally know who your Top Givers are?
2. Are these givers involved at a higher level with your church?



TRAITS OF SUCCESSFUL PLANNED GIVING PROGRAMS

3. Flexibility

There is no 'one-size-fits-all agile' methodology, nor is any one methodology guaranteed to deliver certain results. Successful planned giving programs offer their givers a variety of giving options, each that suite the particular needs and wants of the giver.

Questions to Ask Yourself

1. Do know what planned giving vehicles are best for your givers?
2. Are you comfortable with educating your givers about these vehicles?



TRAITS OF SUCCESSFUL PLANNED GIVING PROGRAMS

4. Inspiration: ability to mobilize and inspire staff, volunteers, and givers

Great planned giving programs push past the boundaries of their organization. They inspire others to take action – leading by example and providing opportunities for others to engage with their cause.

Questions to Ask Yourself

1. Are your givers inspired by your vision and know how to take action?
2. Do you have a team of volunteers and staff that are ready to help with these conversations?



TRAITS OF SUCCESSFUL PLANNED GIVING PROGRAMS

5. Outreach-Savvy: ability to identify select groups of givers with appropriate giving options through direct relationships, a printed and online presence.

Successful planned giving programs have consistent communication with their givers. All forms of media are used on a regular basis to raise awareness and educate givers.

Questions to Ask Yourself

1. Are you currently reaching out to Top Givers?
2. Do your givers know what planned giving is and how they can benefit?

TRAITS OF SUCCESSFUL PLANNED GIVING PROGRAMS

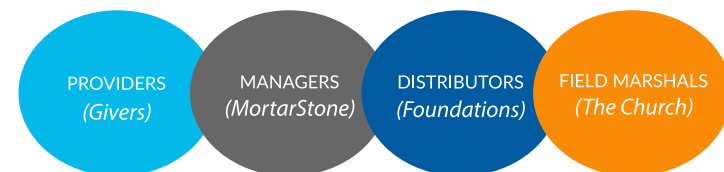
6. Listen & Improve: take time to listen to their givers, church leadership, staff, and volunteers.

Planned giving organizations use a variety of innovative approaches to identify, share, and apply results and lessons learned from their programs and initiatives. They collect and learn from data to develop new or better programs that meet the evolving needs and requirements of their givers.

Questions to Ask Yourself

1. Are you tracking giving trends from your givers?
2. Are you researching different and innovative ways for givers to participate in the worship of giving?

THE FOUR LINKS OF KINGDOM WEALTH



THE FOUR LINKS

PROVIDERS (GIVERS)

- *Givers that God has entrusted significant wealth to for the purpose of advancing His kingdom.*

PROVIDERS



THE FOUR LINKS

MANAGERS (MortarStone)

- *Consultants (MortarStone) that multiply the wealth before passing it further down the chain.*

MANAGERS



THE FOUR LINKS

DISTRIBUTORS (Foundations)

- *Foundations that manage the funds and hold churches accountable for distributing the funds.*

DISTRIBUTORS



THE FOUR LINKS

FIELD MANAGERS (The Church)

- *The Church: those that cast out demons, heal the sick, save souls, nurture believers, multiply churches, etc.*

FIELD MARSHALS



WHAT PLANNED GIVING PROGRAMS LOOK LIKE FOR CHURCHES

1. Identify Your Mission & Vision

Practical Application:

1. Schedule a half-day meeting with your leadership team and discuss and develop your mission and vision.
2. Let MortarStone to lead your team through a vision development session.

Questions to Ask

- What are you funding?
- Why are you funding this cause or causes?
- What is the result of being fully funded?



WHAT PLANNED GIVING PROGRAMS LOOK LIKE FOR CHURCHES

2. Identify Your Givers

Practical Application:

1. Track giving from households aged 50-70+ years
2. Identify giving amounts and frequency
3. Retrieve demographic information about these givers
4. Segment these givers into different groups for outreach opportunities

Questions to Ask

- How are these Top Givers giving?
- Are there particular missions they are passionate about?
- How can planned gifts help these givers?



WHAT PLANNED GIVING PROGRAMS LOOK LIKE FOR CHURCHES

3. Make Your Plan

Practical Application:

1. After you've identified these givers, make a plan for communicating with them
2. Write out your plan and discuss it with your leadership team
3. Bring MortarStone in to help you develop a communication program

Questions to Ask

- What is the goal for these givers and in what timeframe?
- Are there particular giving vehicles that would best suite your church?
- Who is responsible for managing your ministry and programs?



WHAT PLANNED GIVING PROGRAMS LOOK LIKE FOR CHURCHES

4. Build Your Team

Practical Application:

1. Recruit financial volunteers from your church
2. Organize your team and decide how you would like it to function
3. Bring MortarStone in help your team understand it's role and how to operate within the church setting

Questions to Ask

- Do you have financial professionals that can offer volunteer service?
- Is your church currently working with a non-profit foundation?
- Who on your staff can help with your ministry?



PRACTICAL RESOURCES FOR EDUCATING STAFF & VOLUNTEERS

- MortarStone - FAQ document we will send to everyone
- charitableplanning.com
- One-Day Planned Giving Training: web-based or in-person
- Check out - Russell James, J.D., Ph.D., CFP®



PRACTICAL RESOURCES FOR EDUCATING STAFF & VOLUNTEERS

- Next Webinar - ***Understanding Giving Vehicles***
- Setup a meeting with Meagan to get all your answers
- ***Goal: Sustainable Longterm Funding!***



QUESTION & ANSWERS



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

MortarStone.com

