

# NEXT STEPS

From coast-to-coast and around the globe, our professional ministry coaches have helped to build leading generosity and stewardship ministries for over 30 years. Their combined experience and expertise will help you create a thriving gift planning ministry that meets the needs of your church and congregation.

Our customized planned giving coaching program provides training, education and gift management services that will help you achieve your funding goals. *Your unique program will include the following:*

## Define Your Vision & Identify Your Unique Church Story

- Giver Identification
- Budget Optimization
- Gift Planning Program Branding
- Giver Journey & Timeframe for Giving
- Goal Setting & Benchmarking

## Gift Planning Education & Training

- Pooled Income Funds
- Donor Advised Funds
- Charitable Remainder Trusts
- Gift Annuities
- Life Insurance & IRA Rollovers
- Wills & Bequests

## Marketing Support & Resources

- Church Gift Planning Webpage
- 24 Month Marketing Plan/Schedule
- Gift Planning Events
- Event Marketing Materials: phone call script, email script, printed invitation, RSVP webpage, day-of schedule/plan
- Event Resources: white papers and educational collateral
- On-going Marketing Resources: postcards, phone scripts, bulletin flyers, PPT slides, on-stage announcements, social media campaigns

## Giver Education & Management

- Direct Communication with Church Givers
- Educational Webinars and Online Resources
- Gift Planning Consultation

## Legal Support

- Legal Counsel & Support
- Program Setup & Funding
- Laws & Regulations Compliance

*“MortarStone helps me tremendously as the pastor responsible for encouraging the gifts of our generous partners and for thanking, informing and celebrating them. I couldn't do my job effectively or efficiently without MortarStone.”*

*Bayside Church, Roseville, CA*

Schedule a time to talk with us today about your program.

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