



BEQUEST OR NON-CASH GIVING MINISTRY?

*What's the Difference and
Do I Need Both?*





**“One generation shall
commend **your** works to another,
and **shall declare your**
mighty acts.”**

Psalm 145:5-6

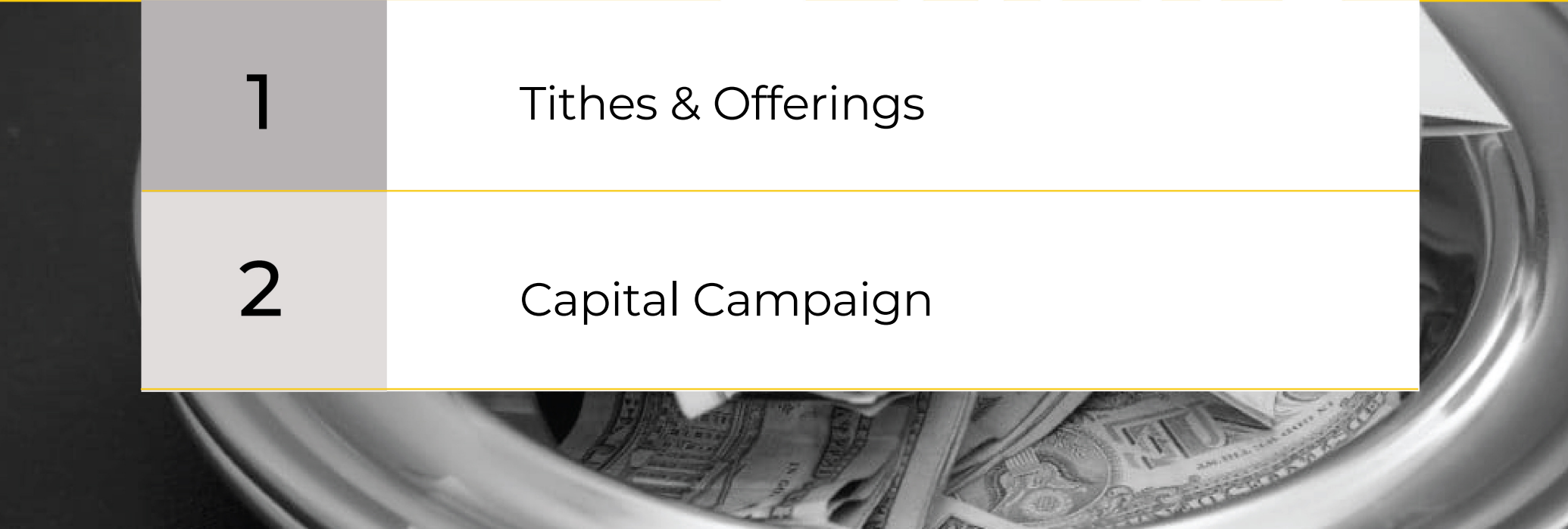
MOST CHURCHES FUND 2 WAYS

1

Tithes & Offerings

2

Capital Campaign



CHURCHES LIKE NPO'S SHOULD FUND 3 WAYS

1

Tithes & Offerings

2

Capital Campaign as Necessary

3

Gift Planning Using Planned Giving

GIFT PLANNING MINISTRY at your church

An integral part of your stewardship ministry...

A gift planning ministry takes the “planned giving” aspect and disciples your givers to give gifts of asset today that can impact the future ministries of the church.





We Define Planned Giving as –

“Doing your giving while you’re living so you’re knowing where it’s going.”

-Ron Blue

Planned Giving is Made Up of 2 Components

1

BEQUESTS

2

NON-CASH ASSETS

that can be used to fund ministry growth! Assets that can be given to/thru specific giving vehicles that will avoid taxes or capital gains thus transferring dollars that would have gone to the IRS and giving them instead to the Kingdom!

Planned Giving Should Involve 2 Key Elements to be Successful –

1

ESTATE DESIGN

Estate Design is creating a thoughtful plan with the things that you manage

2

ESTATE PLANNING

Estate Planning is the drafting of documents to carry it out



THE PROBLEM

Most Planned Giving processes incorporate the two together thus shortchanging both the giver and the church.



A **transformational gift** is usually at stake, so don't rush the process.



LET'S TALK BEQUESTS

Bequests are prepared by
completing an estate design

Bequests are implemented
through an estate plan – a will
or trust



EVERYONE NEEDS A WILL OR TRUST!



**#1
MOST
IMPORTANT**

**Wills or Trusts DO NOT make
Givers Generous – Financial
Discipleship Does!**

What are Your Goals for a Will or Bequest Ministry?

Are they...

- To get your people to have documents?
- To have an expectancy report showing possible future gifts after people die?

You should...

- Document Giver Intent



RULE #1 FOR EXPECTANCIES

If You Don't have a Copy of
What is Left to You Church –
DON'T EXPECT IT!



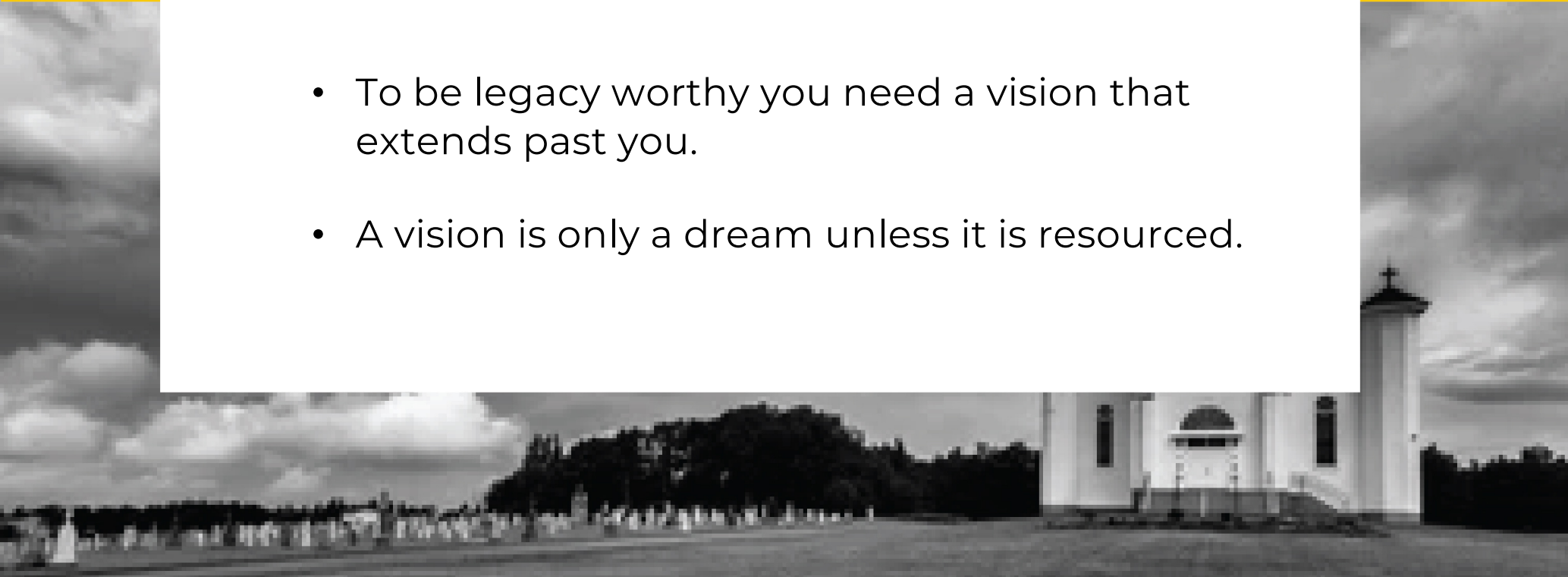


DID YOU KNOW?

- 65% of people do not have this end-of-life document. Of those who do 90% do not include a charitable component
- That means only **3.5% AT BEST** of your people will consider giving you something when they pass.

WHAT IS WORTH A LEGACY?

- To be legacy worthy you need a vision that extends past you.
- A vision is only a dream unless it is resourced.




A photograph of a person sitting at a desk, with their arm and hand visible. They are holding a pen over an open book. The desk has a woven texture. The background is blurred.

Make Sure You're Counting the Cost...

“Suppose one of you wants to build a tower. Won't you first sit down and estimate the cost to see if you have enough money to complete it?”

Luke 14:28



ROD: RETURN ON DISCIPLESHIP

Priceless...this is a true ministry to
the congregation.



ROI: FROM A "BUSINESS OFFICE" PERSPECTIVE

- Evaluate Mortality Tables vs. "known" bequests
- Evaluate if people have completed their will or trust and provided you with a copy
- Evaluate if people have had a change to their charitable component.
- Consider a lapsed giver notification strategy to safeguard against lost bequest
- Evaluate what you are paying to run this program at your church and the actual return you may or may not see
- Seek cost effective solutions (free wills, etc.).

THE ANSWER

The Answer: Non-Cash Assets

Non-cash assets that can be used to fund ministry growth both today and for the future!

They Are...

Assets that can be given to/thru specific giving vehicles that will avoid taxes or capital gains thus transferring dollars that would have gone to the IRS and giving them instead to the Kingdom!



Why is this important?

\$68 TRILLION

- The *Wealth Transfer* is coming \$68 Trillion over the next 25 Years most of which is coming from Baby Boomers or those who are 55+
- Baby boomers represents 43% of total giving in 2020. And 48% of them donated to “spiritual causes” (USA DATA REPORT)

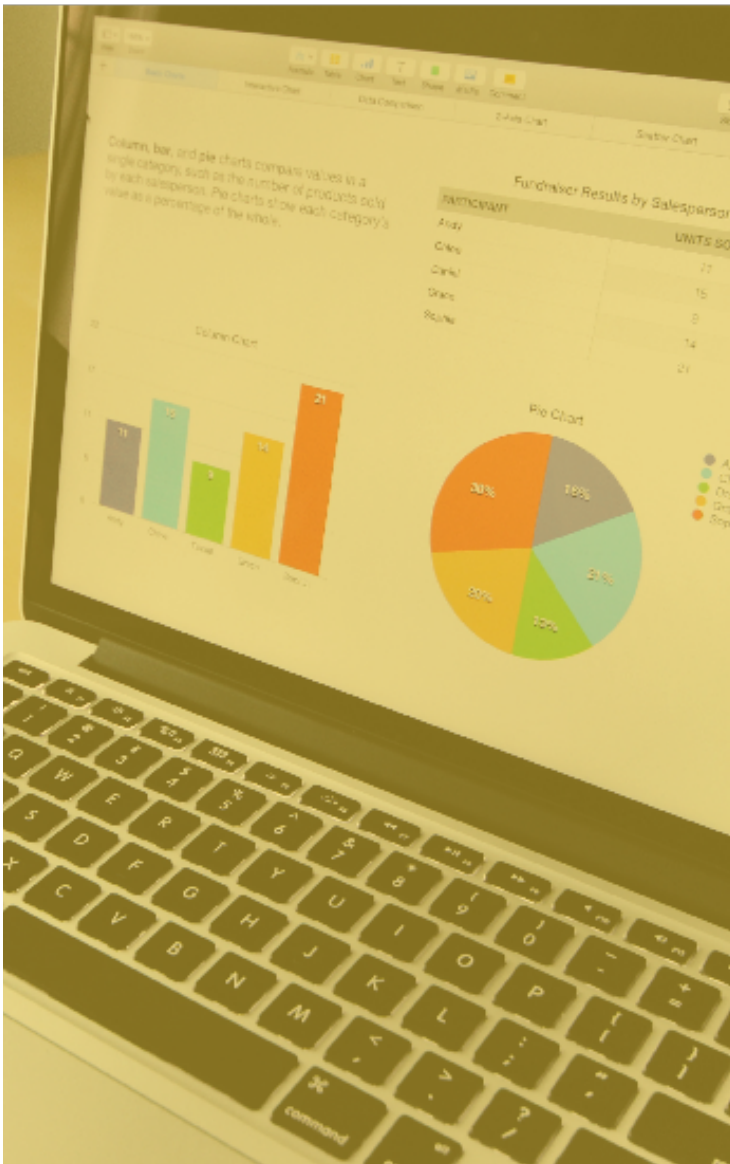
Questions Your Church Should be Asking...

- Do you want any of that wealth to transfer to your church?
- Do you have an idea of what is available to transfer to your church from your current congregation of givers?
- Do you have a plan in place to steward the money if you did receive part of the transfer?



LOOKING AT THE DATA – EXAMPLE

- Take your “known” age-appropriate givers: 275
- On average people who are age 60+ have accumulated \$800K of assets in their Net Worth
- If you have 275 people that could be 220,000,000
- If you received 1% it could \$2.2M of potential assets to fund your church’s vision...THAT’S A BIG NUMBER!
- What could you do with an extra \$2M? Do you have a vision for it...and has it been shared, communicated well and reported on?



NEXT STEPS FOR FOR YOUR CHURCH

1. Count your cost
2. Educate your Givers
3. Have and share a compelling vision.
4. Ground out your vision in theology
5. Secure your Policies & Procedures
6. Communicate, Cultivate , Manage and Build Relationships



Many churches have a vision and strategic plan but forget to put the funding goals to it!



Questions to Consider

- Do you have Senior Leadership Buy in and input on vision
- Do you have Stewardship & Generosity Pastor Participation to connect with givers (pre, during & post the workshops), and to help develop the ministry elements
- Do you have a Coordinator of communication and event planning, and to send church pre-approved marketing information (marketing/communication dept & admin assistants)
- Do you have someone to help with data collection assistance/reports



MOST IMPORTANT – Givers who want to see not only this generation win for the Kingdom but also generations to come!



WEBINAR SPECIAL

- Get a free Church Health Report and Planned Giving Report
- Plus, 30-minute Gift Planning Ministry Consultation.

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