

Planning **PLANNED GIVING**

June 6, 2015 9:30am - 3:30pm

9:30am
Gathering

GATHERING

- ❖ Introductions of each attendee to include:
- ❖ Program status
- ❖ Top success and top challenge
- ❖ Feedback from questionnaire

10:30am
Planned Giving
in Churches

PLANNED GIVING IN CHURCHES

- ❖ Challenges of planned giving in the church
- ❖ Our secret advantage
- ❖ What any church can and should do

Lunch 11:45am

12:25pm
Top 25
Ideas

THE TOP 25

- ❖ Examples of 25 actual ideas that can be duplicated
- ❖ Ranging from easy to complex
- ❖ Includes involved in duplicating the idea: pros and cons, where to get it, cost, expertise needed, time required, etc.

MAPPING OUT YOUR START SEQUENCE

- ❖ Develop a hypothetical sequencing of starting or re-starting your program with a plan in place to transition to a stable long-term plan.
- ❖ This sounds easy... so what do we do next? But the odds are against us. How do we increase chances of success?

1:30pm
Your Plan



The Episcopal
Diocese of
Virginia

Presenter: Karl Mattison
Director of Planned Giving Resources
and the Planned Giving Navigator
Program at the Presbyterian Foundation

