

# Getting Started

## WITH A PLANNED GIVING PROGRAM

### Step 1: Leadership Development

- The Foundation provides an introduction of the Planned Giving Program to your pastor and church leaders
- Identification of the benefits of a Planned Giving Program for the future of your church and church members

### Step 2: Vision-Casting Team Meetings

- The Foundation meets with the newly formed Planned Giving Committee
- The Foundation assists with creating a clear vision of the ministry and mission of the Planned Giving Program for your church

### Step 3: Planned Giving Program Document

- The Foundation assists in establishing and adopting a document that states the purpose, use, administration, and investment of the Planned Giving Program

### Step 4: Congregational Communication

- Program Marketing Kit, resources, and materials for continual education provided for free by the Foundation
- Promotion of the Planned Giving Program through brochures, workshops, mail-outs, speakers, and social media

To begin a Planned Giving Program at your church call 334-793-6820 or email [foundation@alwfumf.org](mailto:foundation@alwfumf.org).

“*Being from a small church and town where the population, church attendance, and contributions were declining, we were worried about the long-term solvency of the church.*”

*After researching our alternatives, much discussion, and prayer, we decided that the best solution was a Planned Giving Program managed by the United Methodist Foundation. The participation and interest by our membership has been excellent!*

*I would suggest that all churches in the conference that are interested in their long-term financial status explore this option.”*

— Jack Golden, Jr.  
First United Methodist Church of Tallassee,  
Endowment Fund Chairman



UNITED METHODIST  
**FOUNDATION**  
ALABAMA • WEST FLORIDA

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## PLANNED GIVING PROGRAM

# Equipping Churches for the Future



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## *Five Ways Planned Giving Programs Help Churches Grow*

1. The church receives increased gifts to fund its various ministries
2. Members begin including planned gifts as well as current gifts in their stewardship response
3. Members are educated about expanded gift opportunities that support the mission and ministry of the church
4. Current contributions given in support of the ongoing annual budget are freed up to strengthen and even expand existing programs
5. The church, and its various ministries, begins to receive major planned gifts that have previously been directed to other charities where planned giving programs are already being encouraged

## *How Planned Giving Programs Help Your Church*

Planned giving and endowment funds are gifts that keep on giving, securing the financial future of the church. An endowment is a gift that can be invested to support various needs in the church such as missions, scholarships, and building maintenance.

## *How the Foundation Can Help Your Church*

- Assist in setting up a Planned Giving Program
- Provide initial documents
- Guide vision-casting
- Help promote giving through marketing pieces
- Provide investment management and administration of funds



## *A Planned Giving Program: What Does It Say about Your Church?*

- We believe in and want to provide for our church's future
- As a church family, we desire to be good stewards of all God has given
- We wish to go the extra mile in providing funds for new and existing ministries, services, and programs
- We want to build a sense of permanence and stability by allowing funds to grow and strengthen ministries within our church
- We want to create a legacy for future generations
- We want to provide an avenue for our members to show their generosity through planned gifts
- We wish to be guided in stewardship by the belief that all we have is from God