

Making a Planned Gift

To benefit your parish, Episcopal Relief & Development

Or your favorite Episcopal charity

James W. Murphy, CFRE



Agenda:

- **Welcome & Introductions**
- **Reflection by Mike Smith**
- **Considering a planned gift**
- **Types of planned gifts**
- **The best choices for you**
- **Fulfilling your wishes**
- **Questions & Conclusion**





Programmatic Priorities

Working together for lasting change

Episcopal Relief & Development partners with locally led organizations around the world to advance lasting change in communities impacted by injustice, poverty, disaster and climate change. We focus on four interconnected priorities.



Early Childhood Development

Equipping parents and caregivers so young children can reach their full potential.



Women and Girls

Forging partnerships to reduce gender-based violence and advance equality.



Climate Resilience

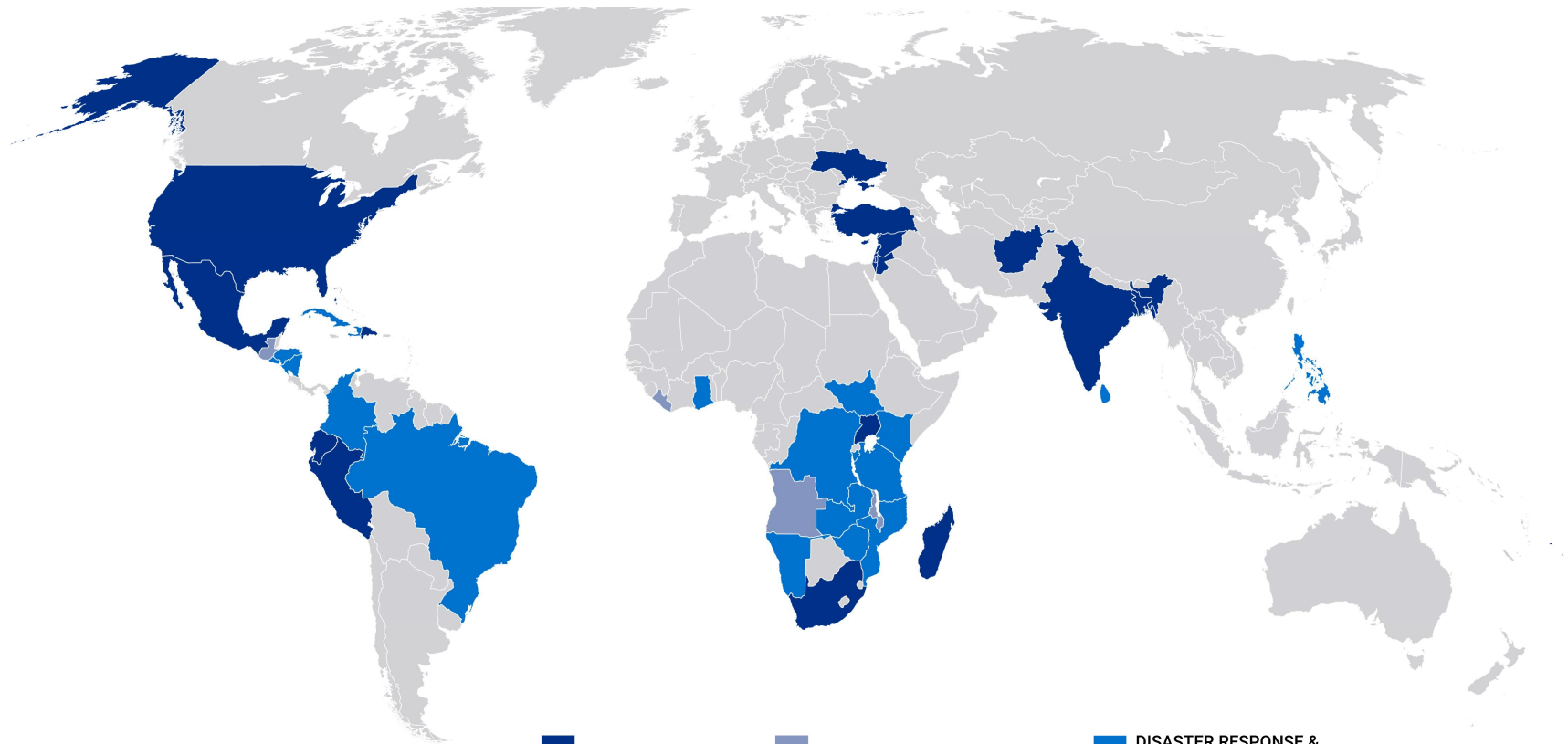
Investing in communities to strengthen resilience to climate change.



Disaster Response

Providing emergency relief and long-term support in disasters.

Current Programs



■ DISASTER RESPONSE ■ DEVELOPMENT PROGRAMMING ■ DISASTER RESPONSE & DEVELOPMENT PROGRAMMING

Mike Smith

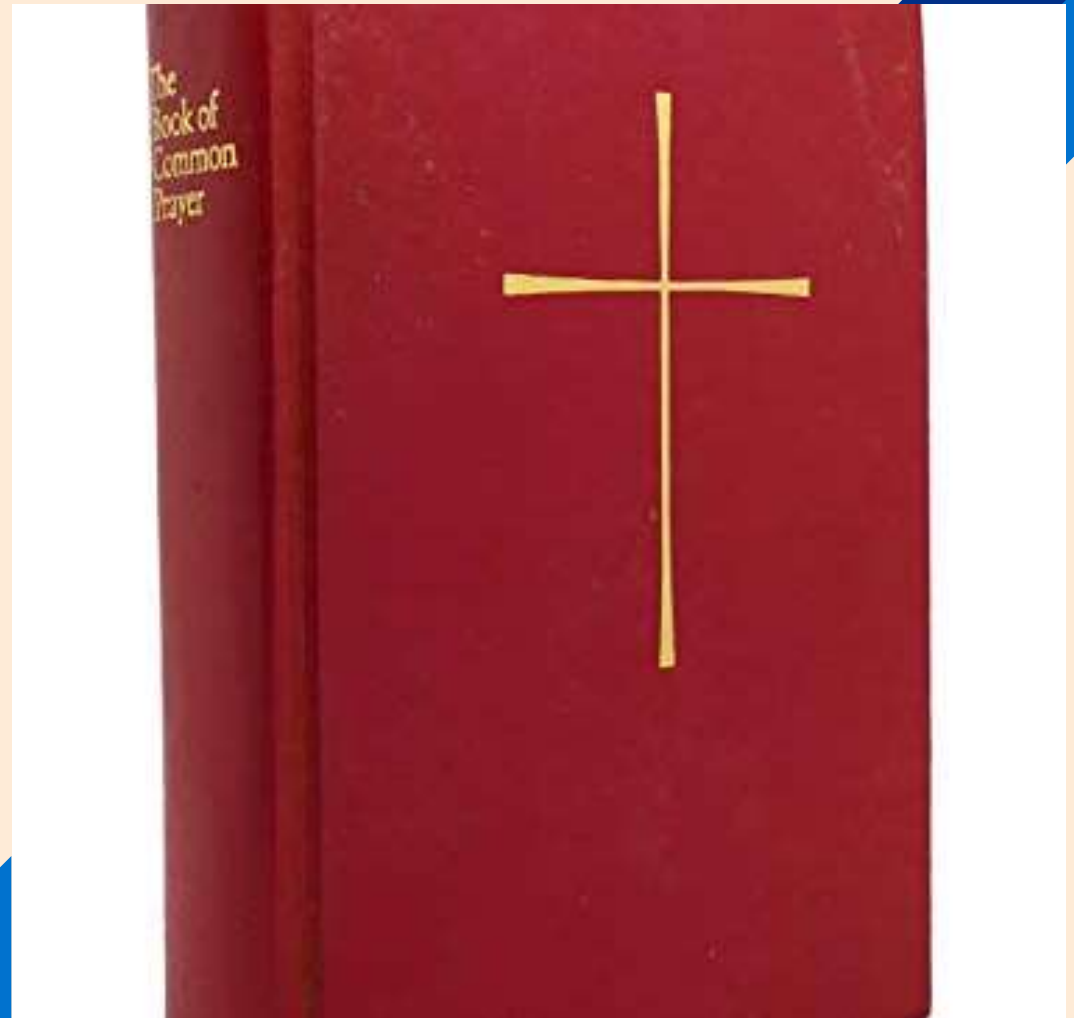
Major Gifts Officer

Reflection



The Minister of the Congregation is directed to instruct the people, from time to time, about the duty of Christian parents to make prudent provision for the well-being of their families, and of all persons to make wills, while they are in health, arranging for the disposal of their temporal goods, not neglecting, if they are able, to leave bequests for religious and charitable uses.

BCP, pg. 445





Types of Financial Giving

For any charity

Annual or Ordinary Giving

- Gifts contributed for operations and on-going work, normally from current income

Extra-Ordinary or Major Gifts

- Gifts for capital campaigns, special appeals, endowments & other significant endeavors from personal assets

Planned or Ultimate Giving

- Gifts supporting future mission for the long-term, normally from estates



Distributing Your Ultimate Assets

Your Probated Estate

Designation by your Will

Unallocated assets

Possessions

Often real estate

Allocated Beneficiaries

Designation by specific forms

Retirement accounts

Bank and brokerage accounts

Insurance

Trust Assets

Current & future designations

What assets are in trust?

Outside of probated estate

Often kept private



Types of Planned Gifts

Raising Charities to the level of family

- **Bequests:** Gifts through Wills or Trusts or Designated Allocations
 - 80-90% of Planned Gifts
- Types to consider
 - Specific dollar amount
 - Percentage allocation
 - Specific asset
 - Remainder value
 - Contingent bequest
- Bequest designations:
 - Restricted
 - Unrestricted



Types of Planned Gifts

Distributed at death

- **Bequests:** Gifts through Wills or Trusts or Designated Allocations
 - 80-90% of Planned Gifts
- **Life Insurance**
- **Real Estate**
- **Life Income Gifts:** Make a gift now, receive income for life
 - Pooled Income Funds (PIF)
 - Charitable Gift Annuities (CGA)
 - Charitable Remainder Trusts (CRUT/CRAT)



Planned Giving Adjacent Tools

Giving now and in the future

- **Donor Advised Funds (DAF)**
 - Make current grants to charity during lifetime
 - Ultimate distributions to specific charities at death
- **Individual Retirement Accounts (IRA)**
 - If over 70 ½ years, make Qualified Charitable Distributions (QCD) to charity
 - If 73, QCD will count toward Required Minimum Distribution (RMD)
 - Ultimate distributions to specific charities
- **Charitable Lead Trusts**
 - Rare, complex, and for the wealthiest of donors

What is Best for Me & my Family?

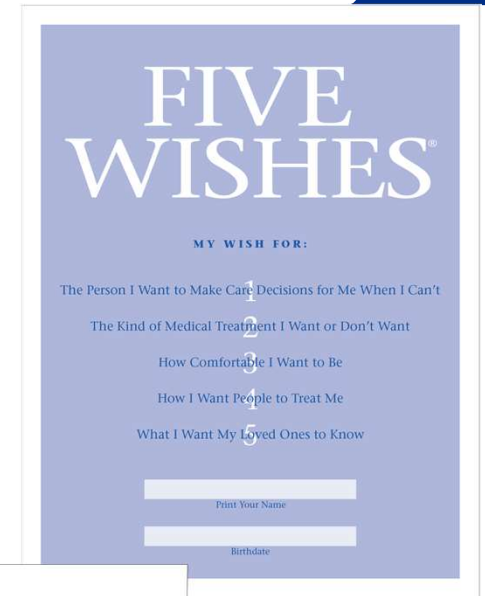


Every situation is different

- Seek appropriate legal, tax & financial guidance
- Ensure your wishes are fulfilled
- Provide for your family & loved ones
- What will your legacy be?

Fulfilling Your Personal Wishes

Episcopal Church Foundation
Five Wishes



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Questions

Ask now, or email me

jmurphy@episcopalrelief.org



Matthew 25 Legacy Society

Episcopal Relief & Development

Leave a Lasting Legacy

...for I was hungry and you gave me food, I was thirsty and you gave me something to drink, I was a stranger and you welcomed me...

Reflection

The Rev. Dr. David Killeen

Rector, St. Thomas' Church - Whitemarsh

Fort Washington, PA



Re



Episcopal
Relief & Development
Working Together for Lasting Change

Contact

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