

Most of us pay our annual pledge from current income but the funding of a planned gift usually comes from accumulated assets—money that has been acquired over the years. Another difference is the idea that it is part of a larger plan and usually involves a time-frame and perhaps even some other people. Planned giving is often part of an overall estate plan, or a plan to transfer existing wealth from the person giving, or the donor, to other people or organizations. Sometimes people make more than one planned gift but it usually isn't an annual occurrence. A stewardship pledge is most often an individual decision made each year to support the operating budget of the parish.

A benefit of a planned gift is the potential for significant tax benefits while making a gift to the church or other charitable organization. These tax savings can be much larger than the limited deductions you receive as a result of an annual pledge and the savings may be carried over in future years.

Planned Gifts come in several forms. You can make an outright gift, a bequest in a will, a change in the beneficiary designation on a life insurance policy or retirement account or the remainder of a life income gift such as a charitable gift annuity or charitable remainder trust.

Any gift you make to benefit is a wonderful act of generosity. It is the means through which you can support a particular ministry or help build the endowment so funds will be available for worship, outreach, program development, and educational opportunities for generations to come.

For the free booklet, *Making a Planned Gift*, please complete this form and return it to the church office or contact the Episcopal Church Foundation at (800) 697-2858 or www.episcopalfoundation.org.

Name _____

Address _____

City _____

State _____ Zip _____

Telephone _____

E-mail _____

What Exactly is Planned Giving?

“Give, and it will be given to you. A good measure, pressed down, shaken together, running over, will be put into your lap; for the measure you give will be the measure you get back.” —Luke 6:38

What exactly is Planned Giving? And how does it differ from your annual pledge?

Both are means by which our church benefits from your financial support. We are all familiar with the annual “every member canvas” or stewardship drive, but considering a planned gift as part of your own stewardship program or estate plan may not be something you’ve considered. Outlining some of the differences will hopefully help you see the advantages of a planned gift as it fits into your own financial planning.

