

20 WAYS TO MARKET ENDOWMENT FUNDS IN YOUR CONGREGATION

By Ruben Swint

1. Develop and distribute a brochure.

An endowment funds brochure is the foundation of the marketing strategy. Unfortunately for most congregations, it is the only strategy they use. Include in the brochure the reasons for endowment funds in the congregation, the past and present benefits to the church of any current funds, and a vision of how the funds will enhance the church's mission in the future. The brochure should also include a statement of support and encouragement from the senior minister, a listing of current funds, a list of possible benefits to donors for tax and estate planning, and contact information.

2. Schedule an annual wills emphasis.

At the same time every year, in January, around April 15, or another appropriate time, emphasize the necessity of an up-to-date will for each household in the congregation. A Christian's will provides an opportunity to establish a lasting witness of the benefactor's faith in Christ. Schedule a will-making

seminar that will prepare congregants to make or update their wills with their own legal advisors.

3. List resource professionals in the congregation.

Many members have not made their wills and some do not have an attorney. Assist them by developing a list of resource professionals in your congregation or community who have agreed to provide an initial no-cost interview to assess the work needed to be done and who will provide a price for their work. In no way should the church be a party to giving legal advice through subsidized fees, or otherwise.

4. Preach and teach on the stewardship of assets.

Worship and sermon planning should include teaching and preaching on the stewardship of assets. The senior minister is "chief steward" of the congregation's mission in the world. Calling for faithful support in this life and beyond is a call to discipleship and maturity in Christ.

5. Acknowledge publicly all estate gifts.

As a part of worship announcements and in regular print communication keep the congregation informed of gifts received from members' estates. In some cases, the deceased will have made a request for the gift to be anonymous. Still, acknowledge the gift amount and its designation, if any. Remind congregants that they too

can leave a legacy of faith and ministry beyond their lifetimes.

6. Establish named funds.

Develop procedures for the establishment of named funds. These are funds that are named for donors or others they choose, i.e., their family members. It is wise to establish a minimum gift amount for named funds that are accounted for separately and can be designated for specific purposes consistent with the mission of the church. All such funds can be co-mingled for investment purposes.

7. Endow annual giving amount.

Members can endow their annual giving by giving an amount equal to 20 times their annual gifts. A fund of \$20,000.00, created with gifts during a lifetime and/or completed with an estate gift, will distribute \$1,000.00 per year in perpetuity. With competent investment management, the annual distribution will grow to keep pace with inflation. Combine this strategy with a named fund opportunity.

8. Schedule a retirement planning seminar.

The largest demographic group in our nation is beginning its retirement years. The target group for this seminar is the Baby Boomer Generation. Many in this generation will be recipients of the largest transfer of wealth from one generation to another, from 40 to over 100 trillion dollars over the next 20

Ruben Swint is a Senior Strategist for The Genesis Group. He can be reached by e-mail at rswint@thegenesisgroup.com.



years! Help them see how careful planning will enrich their retirement years and their gifts of a lifetime to the congregation.

9. Schedule special endowment events: Endowment Sunday, Memorial Day, All Saints' Day. Use special days on the civic and church calendars as times for drawing attention to the stewardship ministry of the endowment funds. A special Endowment Sunday can become a regular event with an outside speaker.

10. Develop donor recognition actions: premium, legacy society. In ways that are appropriate to the congregation, create recognition actions, such as a legacy society or heritage fellowship for all members who inform the congregation that the church is included in their estate plan. Give a small item to remind the members of their deci-

sion. Consider a dinner event annually for these members; invite also those members interested in becoming members of the group.

11. Include newsletter articles. Use the church's regular news media for articles on how distributions from endowment funds are sustaining programs, ministries, and mission activities. Highlight the personal involvement of members and those they serve.

12. Publish memorial gifts. Regular publication of gifts received in honor of or in memory of others will stimulate interest in significant gifts to endowment where these gifts go to current or new endowment funds.

13. Regularly provide answers to Frequently Asked Questions. Congregants will benefit from regu-

lar reminders of the basic facts of endowment funds in the congregation. For example,

Who owns the endowment funds?

Who is in charge of the endowment funds?

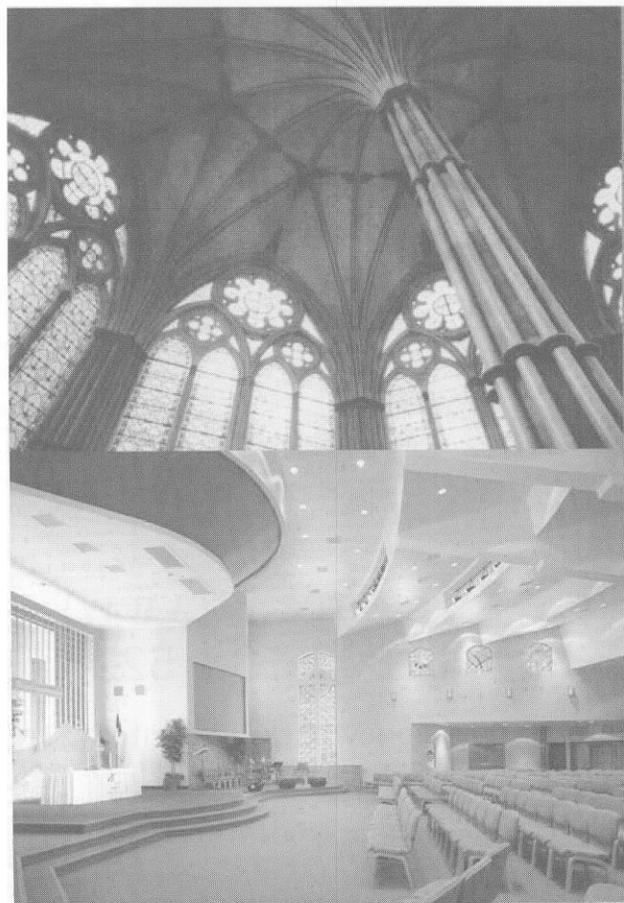
How does money get into an endowment fund?

What happens to money once in an endowment fund?

How does money get out of an endowment fund?

14. Publish sample bequest language.

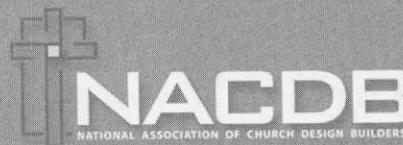
In accordance with the laws of the state the church is in, publish sample language for a bequest to the church. Encourage members to consult their own legal advisor.



WORSHIP IS TIMELESS.

Architecture has always played a dramatic role in the worship experience. The integral interplay of sound, light, colors and textures – all working in concert to create an atmosphere that is both warm and worshipful, inspiring and inviting. Today's church has at its disposal a wide range of modern construction methodologies and technologies capable of enhancing worship as never before. The National Association of Church Design Builders can show you how to plan and build a facility that is as beautiful as it is worshipful. Our knowledge of the latest architectural trends provides an invaluable resource for budgeting and planning your next facility. Log on to www.NACDB.com and use our no-obligation Project Pricing Profiler to determine the potential cost associated with your next construction project.

**P Project
Pricing
Profiler**



Designing and Building the 21st Century Church

1000 Ballpark Way, Suite 306 • Arlington, TX 76011
866.416.2232 • 817.200.2622 • Fax 817.275.4519 • www.NACDB.com

15. Schedule an estate planning seminar annually. An estate planning seminar can benefit senior adults and their children. Issues of estate management, conservation, and distribution should be covered. Often charitable trusts are used for addressing these estate issues. Competent legal and financial professionals should be available from denominational agencies to provide the seminar.

16. Encourage a tithe of the estate value. One way to determine how much to give through one's estate is to tithe the estate value. A bequest could provide that 10% of one's estate, after expenses and debts are paid, go to the person's church. Another method is to stipulate that all or a portion of the residue (what is left after expenses, debt payments and other bequests) go to one's church.

17. Mail an annual report. Mailing an annual report summarizing the receipts to, investment management results of, and distributions from endowment funds is very helpful. Competence, effectiveness, credibility, and trust are key components of successful endowment marketing.

18. Establish a speakers bureau. Create and train a group of speakers from the endowment board or trustees to visit the church's small groups regularly to give encouraging reports on the endowment funds.

19. Publicize types of gifts possible. Regularly inform the congregation of the vast array of gifts that are possible to the endowment funds. Current gifts can include cash, financial assets, personal and real

property. Life income gifts include gift annuities, various charitable trusts, and life estates. Gifts deferred until after one's death include bequests, beneficiary designations, and trusts. Be certain that a comprehensive gift acceptance policy is in place to protect donors and the church.

20. Use the church's Web site. Provide information on the church's Web site about the church's endowment funds. Much of the brochure can be reproduced. Also available are turn-key planned giving Web sites that can be linked to the church's site. These sites provide regularly updated information and examples regarding giving that can be channeled to endowment funds. The cost is negligible given the long-range benefit to the church's mission. 

CHURCH WINDOWS

USER FRIENDLY, FRIENDLY SUPPORT

Computer Software especially for your church!
Denominational versions are available to make annual reporting easy! Ask us about them when you call!

"Church Windows is an outstanding program that serves our needs beyond comparison to any other program that we've researched. I have been pleased beyond words with the outstanding technical support and training that I have received from the staff at Church Windows. It is an exceptional product in all areas!" — *Lori Burke, Oswego Presbyterian Church, IL*

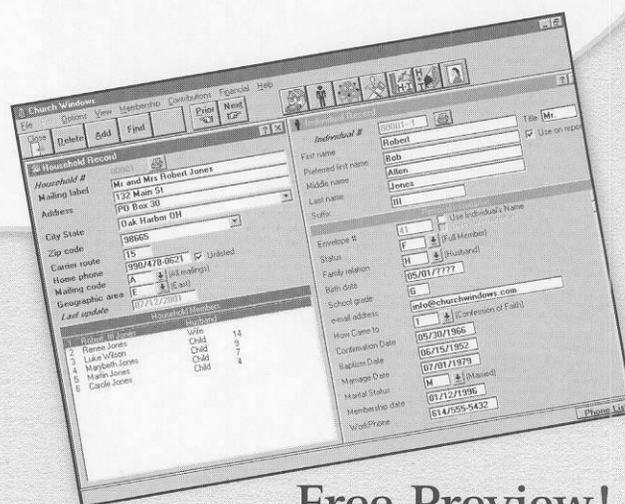
Visit our web page at www.churchwindows.com/30 day money back guarantee

Available by the module or as an integrated package
• Membership • Contributions • Financial • Payroll

Computer Helper Publishing • P.O. Box 30191 • Columbus, OH 43230-0191

Fax: 614-939-9004 • E-Mail: info@churchwindows.com

INFORMATION MANAGER



Free Preview!
Call 800-533-5227