



Achieving Dreams Beyond the Budget

A Guide for Local Church Endowment Teams

REVISED 2026 EDITION



DISCIPLESHIP MINISTRIES
The United Methodist Church

EDITED BY
Rev. Dr. Ken Sloane



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Contents

- 6 Introduction
- 8 Chapter 1: A Theological Basis for Planned Giving in the Church
- 11 Chapter 2: What Is a Planned Gift?
- 13 Chapter 3: What Can Be Given and in What Form?
- 19 Chapter 4: Memorial and Honor Giving
- 23 Chapter 5: The Role of Permanent Endowment Funds
- 26 Chapter 6: The Three Stages of Endowment Development
- 30 Chapter 7: The Pastor's Role in Planned Giving
- 34 Chapter 8: Promoting Planned Giving
- 38 Chapter 9: Tools for Communication
- 45 Chapter 10: The Administration of Permanent Endowment Funds
- 49 Appendix

Dedicated to the memory of

Donald W. Joiner

April 2, 1945 – October 8, 2024

*Your faithful service, leadership, and vision
continue to inspire us to dream beyond the budget,
to steward with generosity, and to build with hope.*

*May this work carry forward your legacy of
wisdom, grace, and love for the local church.*

Introduction

Rev. Ken Sloane

Director of Stewardship & Generosity, Discipleship Ministries

I began working as Director of Stewardship at Discipleship Ministries on October 1, 2011. Don Joiner (who was on the team that interviewed me) was already in his twenty-sixth year of stewardship work for our denomination. Don's stewardship work at that point was primarily in planned giving. He was the main resource person for that area in local churches, and he provided support for United Methodist Foundations across the United States.

Years earlier, Don had developed an amazing resource for local churches that were considering establishing an endowment committee. Don worked closely with his friends and collaborators: Rev. Wayne Barrett, president of the Michigan United Methodist Foundation, and Rev. Fred Leasure, president of the Western Pennsylvania United Methodist Foundation. The book, *Achieving Dreams Beyond the Budget*, was published in 1999 as a fifty-six-page resource, copied on a Xerox machine, three-hole-punched, and shipped to churches in a loose-leaf binder. When I arrived in 2011, this resource was still available, and churches were still calling and emailing to get copies. Still a "newbie," I made what felt like a bold suggestion: that we use our copier to scan the manual into a PDF and make it accessible as a free download from our website, and Don agreed.

Achieving Dreams Beyond the Budget was such a great stewardship resource in many ways—not just for churches developing an endowment fund. There weren't other resources that guided local church leaders with this much detail. However, downloading a PDF was not always the most effective way to put information into the

hands of local church leaders. In 2014, I undertook the project of converting the book into a digital text file and updating its content. Tackling one chapter at a time was time-intensive, so the book revision became the project that I would “work on when I had some free time.” The revision dragged on for years. Finally, the update is complete, and we are ready to share a new, slimmed-down version of *Achieving Dreams Beyond the Budget*.

I want to thank the National Association of United Methodist Foundations (NAUMF) for the support they have always provided to my work. Special thanks go to the following persons: Jeff Taylor (U.M. Foundation of West Virginia), Gary Melville (U.M. Foundation of New England), Brad Duty (Virginia U.M. Foundation), David Bell (U.M. Foundation of Michigan), Terri Turner (Alabama–West Florida U.M. Foundation), and David Malloy (California–Nevada U.M. Foundation), who reviewed this work and improved it.

You may have acquired this book on your own or perhaps received it through the leadership of the Foundation that serves your annual conference. I hope that you find it helpful in growing stewardship and generosity in your local church, but respectfully ask that you don’t share this book or its contents beyond your local church. If you know someone from another church who is interested in having a copy, please refer them to the Discipleship Ministries store at:

<https://store.UMCdiscipleship.org>

“Achieving Dreams Beyond the Budget” equips new and established local church endowment teams with a practical and theologically grounded guide to legacy and planned giving.

An endowment’s impact is far-reaching—it provides a dependable source of income to sustain the church’s mission, it offers faithful members a way to continue their generosity beyond their lifetime, and it creates meaningful opportunities to honor lives of faith while strengthening ministry for generations to come.

This book invites church leaders to move beyond short-term budgeting and cultivate long-term vision. With clear guidance and pastoral wisdom, it helps congregations promote, administer, and celebrate legacy giving in ways that are faithful, sustainable, and inspiring.

How do you want to be remembered?

How long will your generosity shape the future of the church?

Legacy and planned giving is not a somber focus on death, but a celebration of ministry that continues to touch lives and hearts for Jesus Christ.

About the Editor

The Rev. Dr. Ken Sloane has served as Director of Stewardship & Generosity at Discipleship Ministries since 2011. This volume is his adaptation of an earlier manuscript published in 1999 by his stewardship mentor, Rev. Don Joiner.

Ordained in the United Methodist Church in 1981, Ken has served as a local church pastor, on the staff of the Greater New Jersey Annual Conference, and at United Methodist Communications before joining Discipleship Ministries.

He and his wife, Bridget, live in the Nashville, Tennessee area.