

Giving Beyond *the* Sunday Offering

HOSTED BY KEN SLOANE

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Why “Beyond the Sunday Offering”?



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“Are We Leaving Money on the Table?”



A question we don't often ask in the church...

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People Give From 3 Pockets

1. Income

2. Assets

3. Legacy

Traditionally
referred to as
“Planned Giving.”



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“Year-round Stewardship Strategy”

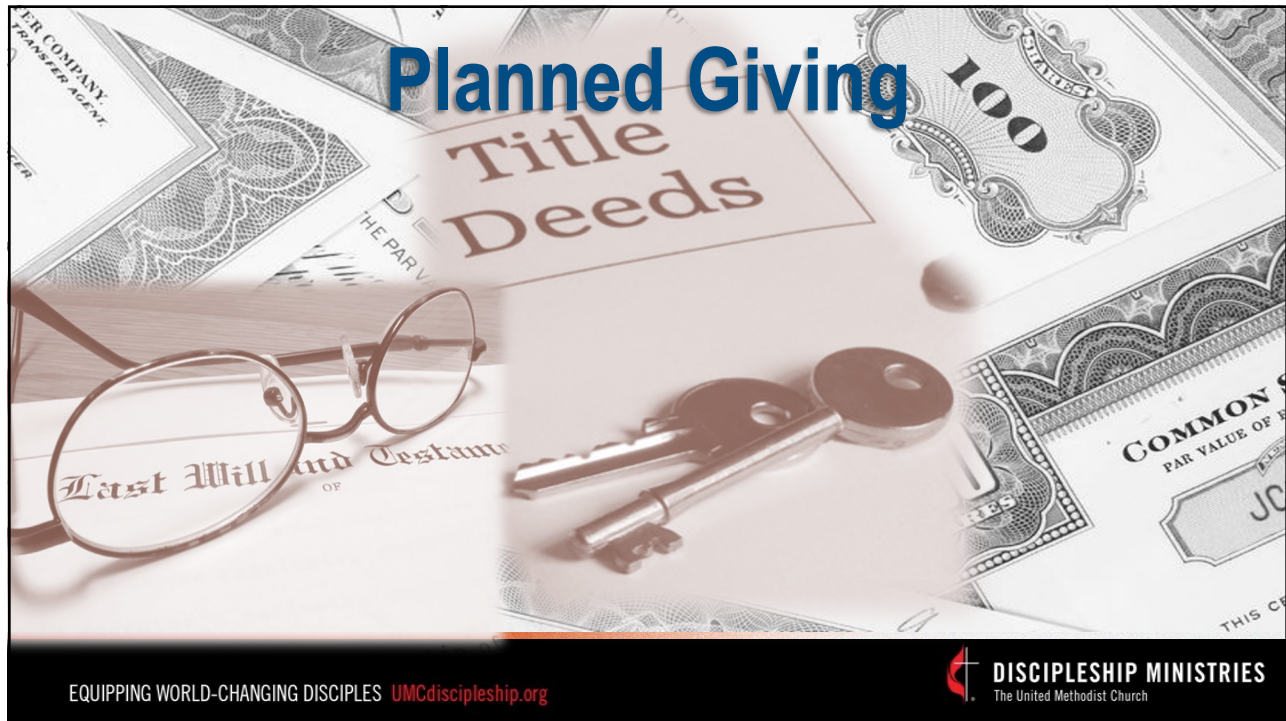
If your year-round strategy only includes asking for donations from the income pocket, it's not a complete strategy.



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Is Estimate of Giving Planned?



2025 ESTIMATE OF GIVING

☐ Yes, I will pray for the mission and ministry of St. Paul's United Methodist Church.

I estimate I will grow in my giving as follows:

My estimate is \$_____ per ☐ week ☐ month ☐ year for an annual total of \$_____


Name: (please print) _____

Address: _____

City: _____ State: _____ Zip: _____

Phone(s): _____ Email: _____

I understand that I can revise or cancel this estimate of giving at any time.



St. Paul's

UNITED METHODIST CHURCH

Rochester, Michigan

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Is Online Recurring Gift Planned?



St. Paul
UNITED METHODIST CHURCH
Rochester, Michigan

Don't usually
consider these as
"Planned Giving"
because they are
primarily from that
income pocket.

OF GIVING

try of St. Paul

si

month ☐ year

State

Email

estimate of g

11:41

Hi, Ken

THE VILLAGE

The Village Nashville

Give

\$450.00

Gift type

Frequency

Starting

Jan 2, 2022

Ending

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Asset Pocket: Cash

Asset gifts are
very often cash
gifts, from savings
or other accounts
not used for
regular expenses.



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Asset Pocket: Stocks, Bonds



Could be stocks, bonds, or other transferable investments, often appreciated in value.

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Asset Pocket: Cryptocurrency

Bitcoin and other cryptocurrency?

Read Article: "10 Things Churches Need To Know About Cryptocurrency."



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Asset Pocket: Real Estate



Home, vacation,
business or
investment
property.



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Asset Pocket: Tax Savings



Increased valuation
means increased
tax liability, and
possibly an
attractive donation.

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Asset Pocket: IRA or 401k

Retirement plans (IRA, 401K) have required minimum distributions (RMDs) that may be taxable.



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YEAR-END IS A
Time for Giving

CASH GIFTS
A cash gift in any amount is a convenient way to support the church or other ministries. If your gift qualifies for a 2022 charitable income tax deduction, your gift must be dated 2022 and received or postmarked 2022, to receive a deduction this year.

GIVING APPRECIATED PROPERTY
If you own investments that have increased in value (such as stocks, bonds, or mutual funds), you can donate them to your local church and receive a charitable income tax deduction for the capital gain of the assets, in addition to the deduction for the value of the assets. This is equivalent of a "double deduction."

SALE & GIFT	
Stock with Fair Market Value (Cost Basis \$200)	\$100
Taxable Gain on Sale	\$80
Capital Gain Tax at 15%	\$12
Net Sales after Tax	\$88
Charitable Tax Deduction	\$88
Total Savings at 22%	\$19.36

GIVING FROM Your IRA MAY SAVE YOU MONEY!

If you have an **Individual Retirement Account (IRA)** and are age seventy (or getting close), you should know about a way you can give to your local church that will strengthen the church's ministry and produce tax savings for you! Here are some important facts you should know.

1. INDIVIDUAL RETIREMENT ACCOUNTS HAVE COME OF AGE (MIDDLE-AGE).
IRAs have been around since 1974, though in the beginning, they were only for folks who didn't have any other pension coverage. A bill in 1981 made

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Asset Pocket: Antiques, Collectibles



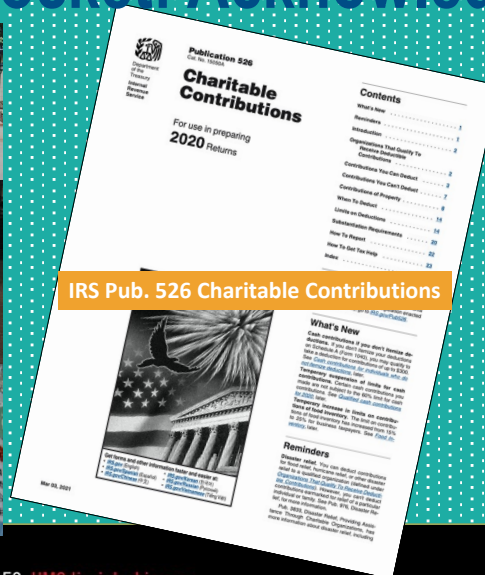
How readily can
this asset be
converted into
dollars for
ministry?

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Asset Pocket: Acknowledging Value



In most cases,
finding the cash
value of the gift
is left to the
donor.

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Asset Pocket: Not Always “an Asset”

Sometimes it's
OK to say:
“No, thank you.”

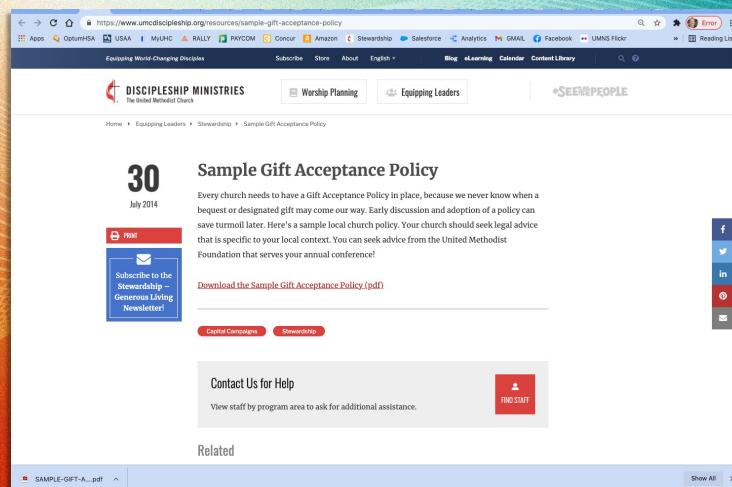
Every church should
have a “Gift Acceptance
Policy” written,
approved, and in force.

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Have a Gift Acceptance Policy?



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Are We Ready for a Large Gift?



Does your Church
have a Planned
Giving Program?

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Legacy Pocket: Wills & Bequests



"We all will die."

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Inviting Gifts from Legacy Pocket

When people die, their assets will go:

- To their family/friends
- To charity/school/church
- To the government

A valid Will ensures donors get to direct how your wishes should be fulfilled.

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Legacy Pocket: Endowed Gift



Gifts that will have an impact that extends beyond our earthly life.

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Inviting Gifts from Legacy Pocket



All the asset pocket gifts we mentioned can also be impactful ways to give from the Legacy Pocket as well.

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People can designate your church as a life insurance beneficiary.

Life Insurance Policy

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Inviting Gifts from Legacy Pocket

Who are most likely to give?

- Those who support you now!
 - ✓ They believe in your ministry
 - ✓ They volunteer
 - ✓ Most are older
 - ✓ Most are female



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Legacy Pocket: Gift with Legacy Impact



Exciting News: Your folks can make some of the best legacy gifts before they die!

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Inviting Gifts from Legacy Pocket

- Endowments
- Charitable Gift Annuities
- Charitable Remainder Trust
- Pooled Income Funds, etc.

People can donate now, get tax advantages, see fruits of their gifts, or even get income while they are living!



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Inviting Gifts from Legacy Pocket

These kind of gifts
require vision,
beginning with church
leaders and achieving
buy-in from members!



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Can We Improve Our Communication?



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Sharing the Opportunities for Giving



Brochures
Education
Stories
Training

Newsletters
Email
Website
Social Media



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Where Do We Begin?

- Start With Yourself!
- Work With Your Leaders
- Make a list of what to give
- Dream about ministries that could be.

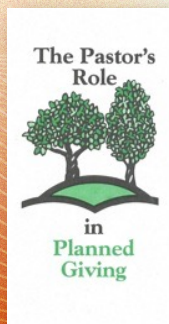


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Resources are Available!



"The Pastor's Role
in Planned Giving"

"A Five-Year
Planned Giving
Promotional Plan"

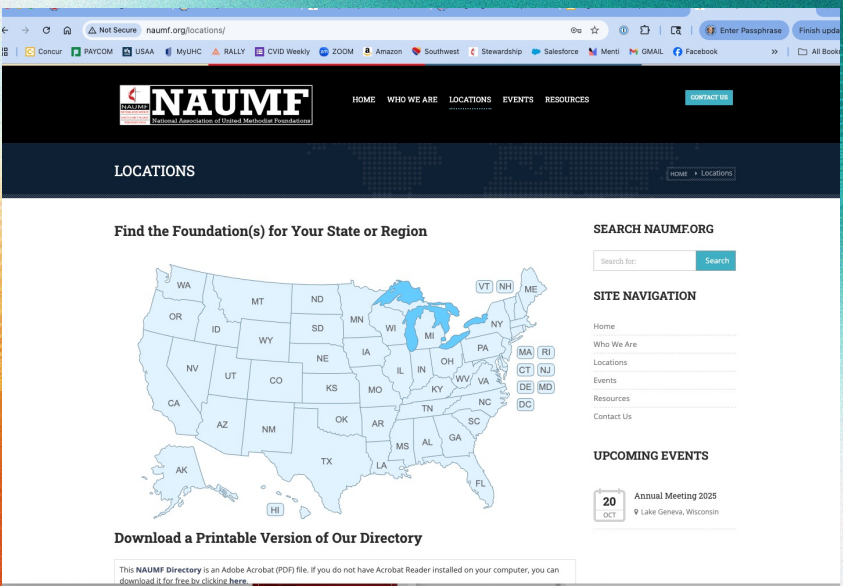


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Expertise in Planned Giving: Asset & Legacy Gifts



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Questions?

Thank You!

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Did the webinar meet your expectations?

☐ It exceeded my expectations

☐ Yes


☐ Somewhat

☐ No

How strongly do you agree or disagree with the following statement: The webinar helped me think about the ways our church may be missing opportunities for funding beyond the Sunday offering.

☐ Strongly disagree

☐ Somewhat disagree



**We'd love to know
what you think!
(Quick survey)**

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☐ It exceeded my expectations


☐ Yes

☐ Somewhat

☐ No

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Finding Our Way with Compass: What You Need to Know

November 13, 2025 | 6:30pm CST

PRESENTERS:
Rev. Dr. Ken Sloane, Discipleship Ministries
Bob Christophel & Tony Prestipinio, Wespath



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Wespath
BENEFITS | INVESTMENTS



COMPASS



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