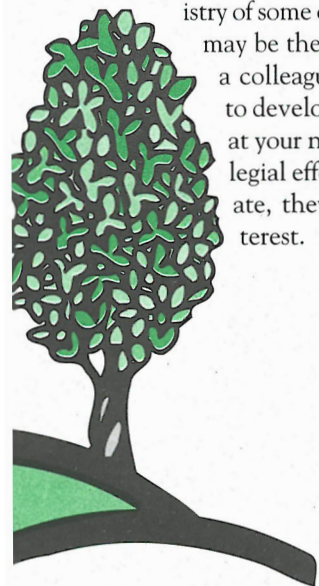


While it is certainly true that the vast majority of planned gifts received in the church are contributed by lay persons, it is equally true that clergy play a vital role in encouraging such gifts to be given in the first place. Countless congregations are robbed of the financial resources which might have been theirs if only the pastor had played a more appropriate role in encouraging gifts. Because of the depth and breadth of their activity, pastors are ideally situated to make a significant difference.

Planting Trees Whose Fruit Will Benefit Others

One fundamental issue in the role of clergy is the understanding that long-term ministries such as planned giving must be understood to be for the congregation's long-term good. Often clergy are tempted to avoid this ministry since its benefits will accrue to one's successors. Nevertheless, even itinerant pastors would do well to recognize that if every pastor planted trees, every church would enjoy fruit. Perhaps your efforts will only benefit the ministry of some other pastor, but perhaps you may be the beneficiary of the efforts of a colleague who is just now working to develop a ministry you will inherit at your next congregation. Such collegial efforts are more than appropriate, they are in everyone's best interest.



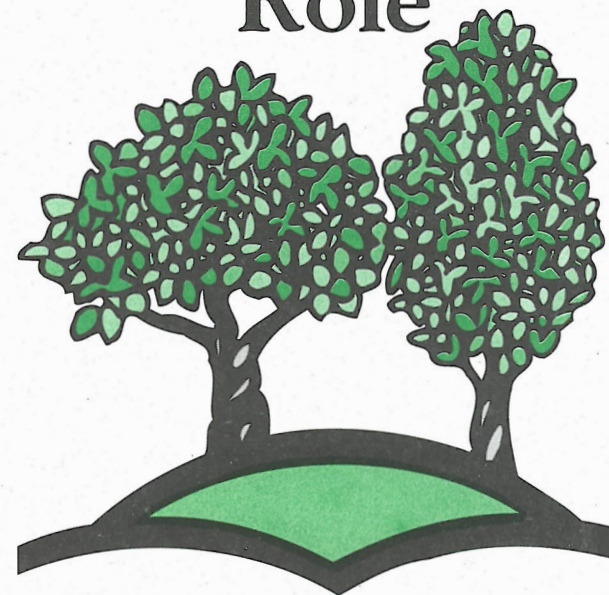
church. If you discuss this issue, either from the pulpit or other setting, you will be encouraging your members to draw upon their religious faith when they do all their planning. Does it not seem likely that this will result in additional gifts?

9 Keep files on planned giving prospects. In an itinerant profession, clergy come and go. Help your successors by providing files with helpful information regarding those persons who have indicated an interest in providing for the church through their wills. These persons often need at least some level of follow-up. Who knows how many potential bequests have been lost through lack of the proper contacts. Include in the files those persons who have had an affinity for church programs—youth, music, missions—without regard to whether they have made major contributions monetarily. Many persons, while unable to give money earlier in life, would be pleased to include a favorite cause or program in their estates if only someone would encourage them to do so.

10 Keep a quantity of planned giving brochures around for distribution to those who demonstrate an interest. One pastor was having coffee following a funeral service when the deceased's husband inquired if the pastor knew anything about wills. To his credit, the pastor acknowledged that he was no expert on the subject but also shared that he had a good brochure on the subject back at the church. Later that week the pastor dropped off a copy of the brochure to the widower. That simple act resulted in charitable gift of more than \$300,000 given to the congregation from a non-member!

Clergy are ideally situated to provide effective leadership in the planned giving ministry of the church. Because you have entree in all areas of the church's ministry you will find many places where you could encourage planned gifts. Resolve to raise your awareness and be "on the lookout" for opportunities. Your efforts will be richly rewarded and you will have rendered a significant pastoral service. May God richly bless your efforts!

The Pastor's Role

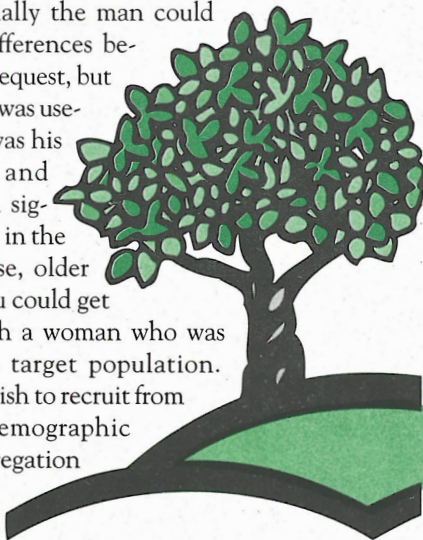


in Planned Giving

1 Make your own plans first. It is a difficult thing indeed to encourage others to do that which you yourself have not done. For this reason your efforts will be most fruitful if you begin in your own backyard. Consider the ministries you wish to support beyond this life. Perhaps there is no single local congregation toward whom you wish to direct a bequest or other planned gift. Rather, you may wish to consider a gift to your denominational foundation or similar denominational unit. This gift could be endowed to provide annual gifts to each of the churches you have served, even those you have not yet served. In any case, you will do well to make your own gift before you consider leading others to do so.

2 Recruit a good team. Effective planned giving ministries are too important to reside within a single person, no matter how motivated and talented. Resolve to find a cadre of enthusiastic persons who will join you in developing a “world class” planned giving ministry for your congregation.

It is not nearly as important that your team include experts and technicians in estate planning or finance as it is vital that the team include “people persons” who have entree and credibility with your target audience. One church found a recently-widowed retiree provided great leadership to a significant number of senior church members. “I’m getting invitations to dinner from the widows anyway,” the man remarked. “I might as well bring some endowment brochures along.” Initially the man could not describe the differences between a trust and a bequest, but that was not why he was useful. His great asset was his credibility with and popularity among a significant target group in the church—in this case, older women. Perhaps you could get the same result with a woman who was herself among the target population. Similarly, you may wish to recruit from a variety of key demographic groups if your congregation is particularly large.



Clergy are ideally situated to provide effective leadership in the planned giving ministry

3 Be on the lookout for planned giving prospects. The difference between churches that allow planned gifts and those that encourage them is often the degree to which the leaders identify prospects. The pastor is admirably situated to identify those who have both the capacity and the affinity to include the church in a planned gift. In pastoral visitation as well as counseling situations pastors often receive clues regarding the openness for planned gifts. During the grief period after the death of a spouse a member might indicate interest in some sort of permanent memorial. Don’t forget this information later when the grieving period has passed. Similarly, pastors often have advance notice of retirement plans and other life-cycle issues. A skilled pastor recognizes these as signs of possible planned giving activity.

4 Make certain planned giving programs are scheduled. In addition to the all-church Wills Clinics and other events, assist small groups within the congregation to provide programs with a planned giving orientation throughout the year. Have a senior citizens group or Sunday School class? Why not suggest an Estate Planning Seminar sometime this year? When was the last time your couples group had a program addressing financial planning or a similar topic? The pastor can play a critical role in building this important topic into the life of the church.

5 Include planned giving themes in your preaching. Perhaps no opportunity for promoting planned giving is as unique to the clergy as the opportunity presented each week in the pulpit. If you do not have anything you can proclaim in a sermon it is questionable whether you really believe in planned giving. Use planned giving information as illustrative material. Make your own testimony about your estate planning journey. Speak about the stewardship of our accumulated resources. With a little effort and experience, you will find this a topic rich with homiletical opportunities.

Consider these biblical/theological issues as preaching possibilities:

- The Old Testament concept of the Year of Jubilee. Is this 70 year cycle really a call for planned giving?
- The Parable of the Rich Fool. Is this merely an ancient reminder of the modern concept of “you can’t take it with you”?
- The Parable of the Wise and Foolish Virgins. Isn’t the point of the story to plan?

6 Make regular announcements during worship services whenever bequests and other planned gifts are received. This is an important reminder that remembering the church in one’s estate is a faithful expression of stewardship. Furthermore, the pastor’s announcement gives a powerful example of positive feed-back.

7 Observe an annual dedication service where planned and memorial gifts are recognized and dedicated during the worship service. Consider All Saints Day or Memorial Day as settings where these gifts are dedicated. Not only will additional gifts likely be forthcoming, but you will have demonstrated a powerful truth—these gifts to the church will not go unnoticed. Why not make a special effort to invite the family of those whose gifts are being recognized? Experience suggest that doing so cements the relationship between church and the next generation and goes a long way toward developing additional gifts.

8 Raise other estate planning issues in worship settings. For example, as a part of your Mother’s Day service or Festival of the Christian Home, lift up the need for guardianship for minor children. Even when younger persons create a will primarily for protection of heirs, there is a strong possibility that a charitable bequest could be included. When later revisions of an estate plan are developed it is even more likely that a charitable bequest will be included if previous wills have contained such gifts. In many states the matter of durable powers of attorney for medical matters (Living Wills) is a significant ethical issue that cries out for guidance from the

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