



Workshop on Planned Giving & Endowments for Parish Leaders
Diocese of Northern California, Capital Deanery
Sunday – November 19, 2017 – 2:00-4:00pm

At Trinity Cathedral Sacramento - 2620 Capitol Avenue • Sacramento, CA 95816
916-446-2513

Setting Up a Planned Giving Program for Your Parish - 2:00pm – 3:00pm

Take the mystery out of planned giving for your parish. Learn in easy to understand terms how planned giving differs from annual stewardship and capital campaigns, and how your parish can build endowments through wills and life income and other planned gifts. After a review of the planned giving instruments, you will learn about the importance of a parish vision and how to invite others to remember your parish through estate and financial planning.

Importance of Endowment Structure - 3:00pm - 3:30pm

Every church, no matter how large or how small, deserves to have a well-structured endowment in place. Endowments breathe life into a congregation. They make new ministries possible, spark creative outreach projects, ease the burden of long-term capital expenses, and secure the future of our churches. From the donor's perspective, a well-ordered endowment provides a trustworthy means of making a legacy gift.

Using ECF Resources and Planning a Legacy Society for Your Parish - 3:30pm-4:00pm

Begin to learn how to use the resources provided by ECF's new toolkit, *Planned Giving on Demand* and other resources to encourage new gifts to support your parish's future through estate and financial planning. We will also briefly review how to create and sustain a Legacy Society to encourage giving to your parish for decades to come. You will leave the workshop with a plan of action and learn how ECF can support your future efforts.

To register for the November 19th workshop, please contact Andrea Zmuda at azmuda@episcopafoundation.org or (800) 697-2858 by Wednesday, November 15th.



James W.N. Murphy, CFRE
Managing Program Director

Jim Murphy is Managing Program Director of Endowment Management, Planned Giving and Donor Solutions at the Episcopal Church Foundation (ECF). He oversees ECF's Financial Resource development programs and resources, including planned giving, donor solutions and endowment management. He leads workshops and works with congregations, dioceses, and other Episcopal organizations to enhance and develop their programs and resources.

Prior to joining ECF in 2008, Jim was Director of the Master of Arts Program and Program Manager for Lifelong Learning & the Center for Christian Spirituality at the General Theological Seminary. For more than 16 years he worked for a major international law firm in NYC, serving in a number of financial management roles. He has been an active volunteer leader in stewardship, parish administration, and Christian formation ministries in several Episcopal parishes in New York and New Jersey.

A native of Lansing, MI, Jim holds a Certificate in Fundraising from New York University's School of Continuing and Professional Studies, an MA in Christian Spirituality from the General Theological Seminary, and a BS from NYU's Stern School of Business. Jim is a member of the Association of Fundraising Professionals (AFP) and is a Certified Fund Raising Executive (CFRE).