



**Diocese of Easton – Diocese of Delaware**  
**Workshop on Planned Giving/Endowments for Parish Leaders**  
**Saturday – March 21 - 9am -3pm**  
**St. Peter's Church Parish Hall, 115 St. Peter's Street, Salisbury, MD**

**Advanced registration required – Deadline to register – March 16**  
**To register go to: [Eventbrite ticket reservation](#) \***

*Both parishes with an existing Planned Giving ministry and/or an Endowment, as well as those without one, will benefit from this workshop. This workshop reviews best practices and empowers leadership to be able to take the best, next steps for their congregation!*

**9-9:30am – Gathering**

**9:30am-10am**

**Are you ready for the future of giving at your congregation?**

Does your congregation have up-to-date endowment and gift acceptance policies in place? Do you encourage gifts from Donor-advised funds? Do you promote gifts from individual estates and Trusts? Are you prepared to accept gifts from those seniors making charitable gifts from IRAs? Are you recording and recognizing all types of gifts properly? Learn how your congregation can prepare both for the future of your congregation and the many changes that are coming to giving.

**10am-11:30 pm**

**Setting Up a Planned Giving Program for Your Parish**

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, protecting and growing your endowment, and how to invite others to remember your parish through estate and financial planning.

**11:30am-12 noon**

**Developing relationships and building trust with donors**

Through an interactive discussion, review effective ways to work with donors and initiate conversations leading to planned giving discussions and future gifts.

**Lunch 12 noon – 1pm**

**1pm-2pm**

**Importance of Endowment Structure**

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.

**2pm-3pm**

**Creating a Legacy Society and using Planned Giving on Demand for Your Parish**

Join us to learn how to use the resources provided by ECF's new toolkit, Planned Giving on Demand to encourage new gifts to support your parish's future through estate and financial planning. We will also 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!



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**Jim Murphy** is Managing Program Director of Financial Resources 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).