

## Church Investment and Legacy Academy

*This four-part series is intended for church leaders involved in investment and legacy giving activities in the local church. Improve your understanding of planned giving basics and take your investment knowledge to the next level with these engaging educational opportunities. Sessions will be held quarterly via Zoom at noon on Feb. 25, May 20, Aug. 19, and Nov. 18. Sessions will be recorded and registered participants will receive a link to the recordings.*

### **Best Practices for Church Investing with Susan Black, CFRE, CAP® 2/25/26**

Many churches own assets held in a variety of investment vehicles and with a variety of vendors, but understanding and implementing best practices for guiding and stewarding your church investments requires more than a quarterly review. Join Susan Black as she highlights the most important things every church needs to know about managing their investment funds.

### **Developing Your Church Investment Strategy with Karen Manczko of Wespath Institutional Investments 5/20/26**

Help your church build a thoughtful and sustainable investment strategy aligned with your mission and values. Participants will explore key principles of responsible investing, risk management, and long-term financial planning tailored to the unique needs of faith-based organizations. Leave with actionable steps to steward church resources wisely and support ministry growth for generations to come.

### **Legacy Giving in the Local Church with Susan Black, CFRE, CAP® 8/19/26**

If you've ever wanted to start a legacy giving program in your church, but don't know where to start, this session is for you. Learn the building blocks of success for church legacy giving programs and start tapping into the potential that legacy giving has for your church.

### **Life on the Receiving End - What Pastors and Local Church Leaders Need to Know About Accepting Gifts with Rev. Brian Sheetz 11/18/26**

Churches are good at receiving checks in the offering plate, but this is just the tip of the giving iceberg. A church that can effectively, carefully and professionally receive gifts such as stocks, vehicles and even real estate opens up incredible opportunities for their supporters to be generous. In this session, attendees will develop an understanding of the principles of gift reception and receive important step by step instructions for working with the types of donations your church may be likely to receive, and even some that are less likely. Expect a lively session from Methodist Foundation of Ohio Executive Director, Rev. Brian Sheetz.

**Register for this academy [here](#). One registration provides a registrant with access to all four sessions. Registration opens Dec. 1.**