



## Planting Trees Whose Fruit Will Benefit Others

While it is certainly true that the vast majority of planned gifts received in the church are contributed by lay people, it is equally true that pastors play a vital role in encouraging such gifts in the first place. Numerous churches are blessed with financial resources because the pastor played an active role in encouraging gifts. Pastors are ideally positioned to make a significant difference.

Planned giving must be understood for the congregation's long-term good. Pastors are often tempted to avoid this ministry since its benefits will often accrue to one's successors. Nevertheless, even itinerant pastors would do well to recognize that if every pastor planted the seeds of planned giving every church would enjoy fruit. Perhaps your efforts will only benefit the ministry of another pastor, but maybe you will be the beneficiary of efforts by a colleague who is just now working to develop a ministry you will inherit in the future. Such collegial efforts are more than appropriate, they are in everyone's best interest.

## Maintain Files on Planned Giving Prospects

Help your successors by providing files with helpful information regarding individuals who have expressed interest in providing for the church through their wills and trusts. Some level of follow-up is always good—Who knows how many potential bequests have been lost through lack of follow up?! Include in the files those who have expressed an affinity for church programs—youth, music, missions—without regard to whether they have made major contributions in the past. Many people, while unable to give money earlier in life, would be pleased to include a favorite cause or program in their estate if only someone encourages them to do so.

## Keep a Quantity of Planned Giving Brochures Available

Brochures on a variety of giving topics are available through the United Methodist Foundation of Michigan. Check out our website for more information.

Pastors are ideally situated to provide effective leadership in the planned giving ministry of the church. Because you have entrée 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 mindful of opportunities. Your efforts will be richly rewarded and you will have rendered a significant pastoral service. May God richly bless your efforts!

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## The Pastor's Role in Planned Giving

*an opportunity to significantly  
impact legacy giving  
in your community*



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## Make Your Own Plans First

It is a difficult to encourage others to do that which you yourself have not done. For this reason, your efforts will be most fruitful if you begin with your own plan. Consider ministries you wish to support beyond this life. You may consider a planned gift to a local church, the Foundation, or other charities. A gift could be endowed to provide annual gifts to each church 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.

## Recruit a Good Team

Effective planned giving ministries are too important to be led by a single person, no matter how motivated and talented. Resolve to find a cadre of enthusiastic individuals who will join you in developing a sustainable planned giving ministry for your congregation. It is not nearly as important that your team include experts and technicians in estate planning or life income gifts as it is vital that the team include people who have entrée and credibility with the congregation.

## 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 affinity to include the church in a planned gift. Pastors often receive clues regarding the openness for planned gifts during pastoral visitation or casual conversations. During the grief period following the death of a spouse, a member may indicate interest in some sort of permanent memorial. Remember 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 signs as moments for possible planned giving activity.

## Make Certain Planned Giving Programs are Scheduled

In addition to all-church estate planning forums, assist small groups to provide education with a planned giving orientation throughout the year. Have a seniors group or Sunday School class? Why not suggest an Estate Planning Seminar? When was the last time an organized 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.

## Include Planned Giving Themes in Your Preaching

Perhaps no opportunity for promoting planned giving is as unique to the pastor as the opportunity presented each week in the pulpit. Use planned giving information as illustrative material. Make your own testimony about your estate planning journey. Speak about the stewardship of our accumulated resources. You will find this topic rich with homiletic opportunities.

Consider these 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?”

## Make Announcements During Worship Services

Be sure to announce when bequests and other planned gifts are received. This announcement is an important reminder that remembering the church in one’s estate is a faithful expression of stewardship. Furthermore, the pastor’s support gives a powerful example of positive feedback.

## Observe An Annual Legacy Dedication Service

Scheduling an annual time when planned and memorial gifts are recognized and dedicated during the worship service is a great practice. Consider All Saints Day or Memorial Day. Not only will additional gifts likely be forthcoming, but you will also demonstrate that gifts to the church are appreciated and noticed. Why not invite the family of those whose gifts are being recognized? Experience suggests that doing so cements the relationship between the church and the next generation. It also goes a long way to encouraging the development of additional gifts in the future.

## Raise Other Estate Planning Issues in Worship

For example, part of your Mother’s Day service could be lifting 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 in a revised estate plan. It is even more likely that a charitable bequest will be included if previous documents 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 church. If you discuss this issue, either from the pulpit or other setting, you will be encouraging members to draw upon their Christian faith when they do all their estate planning. This open discussion will likely result in additional gifts.



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