Starting and Sustaining Planned Giving in Your Episcopal School

THE EPISCOPAL CHURCH FOUNDATION
What you need to know for today!

• All phones will be muted.
• Use the “chat” tool on the webinar screen to ask a question or make a comment.
• The webinar will be recorded and available for future viewing on the NAES website.
Panel Members:

Lou Porter Bailey, Director of Alumni Relations and Planned Giving, St. Stephen's Episcopal School, Austin TX

Valerie L. Burke, Director of Development, St. Stephen's & St. Agnes School, Alexandria VA

Timothy H. Graham, Director of Development, St. Andrew's/Sewanee, Sewanee, TN

Jim Murphy – Moderator

Managing Program Director, ECF
Planned Giving-Panel Discussion

- Successes and challenges
- Future Plans
- Tips for others schools

Valerie Burke  Lou Porter Bailey  Tim Graham
What is special about Planned Giving?

- Future focus
- Donor passion
- A planned gift raises the institution to the level of family in a person’s estate plans
- Sensitivity to individual needs, estate planning and end of life issues
- Building trust & sustaining awareness
Questions for panel?
What is the Episcopal Church Foundation (ECF)?

Overview:

• Independent and lay-led foundation
• ECF’s mission is to strengthen the **leadership** and **financial** capabilities of Episcopal congregations, dioceses, and other institutions
• ECF carries out this mission through a wide array of programs including...

**Leadership Resources**
- ECF Vital Practices (ecfvp.org)
- Vestry Resource Guide
- Fellowship Partners Program
- Educational Events
- Vital Teams

**Financial Resources**
- Vision and Strategic Planning
- Capital Campaigns
- Planned Giving
- Endowment Management
- Annual Giving/Stewardship
At your service

ECF always available to assist at (800) 697-2858

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Ken Quigley, Program Director, Endowment Management Solutions
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Meg King, Assistant Program Director, Financial Resources
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Online learning with NAES

Upcoming Webinars

Disruptive Service: Moving From Needs to Assets - Thursday, February 11, 2016

Webinar Archive

- Episcopal Identity 101 (September 2015)
- Considering a Capital Campaign (October 2015)
- Marketing Your School’s Episcopal Identity (March 2015)