


Develop your plan

- Time Line
- Who will share the story
- Why ... message/vision
- When is the best time
- How to follow up
- What gifts are acceptable


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Timing

- Develop a Time line as a committee
- Develop your plan and then Work your plan


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Ongoing Program Activities

- Bulletins & Web site
- Brochures & Pew Cards
- Letter from the Pastor
- Educational Sessions
- Small group gatherings
- Individual meetings

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Educational Opportunities

- OCF Wills & Trusts Week
- Coordinate Financial workshops with other parishes OCF can help with this
- OCF resources include a workshop series
- ALWAYS CLOSE with the Legacy program

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Recognition Program Activities

Recognition Club

How to qualify

- No minimum
- Will, Trust, Retirement Plan
- Insurance
- Charitable trust
- Outright gift

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Recognition Program Activities

Recognition Program cont.

- Search letter
- Founding members
- Printed materials (brochure, bulletins)
- Annual Event format
 - Who comes
 - Say thanks-don't sell for more gifts
 - Program and Location

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Gift Acceptance Policies


Adopt OCF Gift Acceptance Policies
read them!

Keep it simple...

- Accept bequests and Beneficiary Designations
- Refer all other planned gifts to OCF

Know Who can accept gifts and information required

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Planned Giving

BEQUESTS

- Most common vehicle
- % of an Estate (charitable child)
- % of Residual of an Estate
- Specific Asset
- Specific \$ amount

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Planned Giving

- Beneficiary Designation
- Another Very Common Giving Strategy
- % Contingent Beneficiary
- % Beneficiary

- Life Insurance – Retirement Funds
- Mutual Funds – Bank Accounts
- Transfer on Death

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Planned Giving

Gifts of Securities

- Capital Gain
- Recent tax legislation change: in kind transfer of appreciated securities = no tax
- Easily facilitated through the Foundation

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Planned Giving

Life Income Gifts

Provide a stream of income for a period of years or lifetime(s)
 Remaining funds go to a charity(s)
 During lifetime or in Will/Trust

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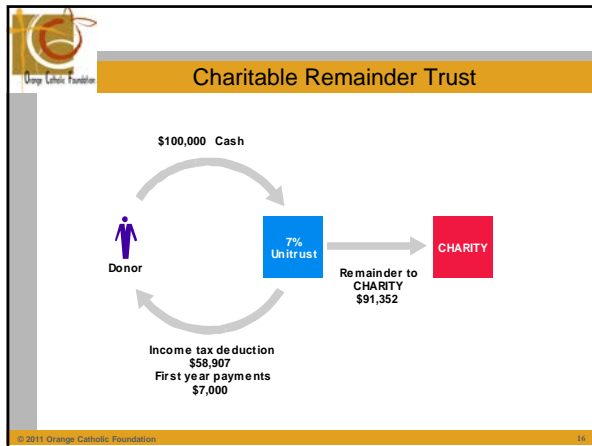
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Charitable Gift Annuity

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    graph LR
      Donor[Donor] -- "$100,000 Cash" --> Annuity[6.8% Charitable Gift Annuity]
      Annuity -- "Income tax deduction $47,911  
Annual payments $6,800" --> Donor
      Annuity -- "Remainder to CHARITY $61,395" --> Charity[CHARITY]
  
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- Unique Planned Gifts**
- Charitable Lead Trust
 - Alternative to a family foundation
 - Income to Charity over a period of years
 - Pass to family tax free
 - Life Estate
 - Remain in family home
 - Transfer title to charity today
 - Current tax deduction today
 - Remove from estate
 - Charity acquires on death
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Provides Services to
Parish, School, Center, Catholic Organizations
investment of endowment
or
special interest funds

Parishioners, Families, Donors
Family endowment funds
Donor advised funds

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OCF Funds

Endowment Fund
Donor Advised Fund
Special Interest Fund
Scholarship Fund
Discretionary Fund


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Investment Policies

- Balance asset growth with prudent level of risk and mission
- 12 year ROI
- Retain professional money managers
- Regular review by Investment Committee and Board to policy and benchmarks

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Spending Policy

Currently set at 5% of market value of fund calculation based on up to 12 quarter rolling average

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Thank You

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