



# Legacy Giving Started 2000 Years Ago



The little boy with his loaves and fish established a new form of creative giving.

The Savior multiplied his gift many times over and it is remembered today as his legacy.



# Legacy Giving Continues Today

Some of God's choicest saints, such as Randall and Janet, still give as creatively as the little boy and are creating their own legacies.

Randall and Janet have created an endowment in their local church for ministry to women and children in their community.



# Legacy Ministry Is for Today and Tomorrow

Some Nazarene churches are, and many more should be, receiving significant legacy gifts through the Church of the Nazarene Foundation. These churches in many case are able to:

- Retire debt
- Create ministry endowments
- Supplement current budgets
- Enhance capital campaigns



# Legacy Ministry Expands Giving Opportunities

Historically, we have funded the ministry of the Church from cash offerings.



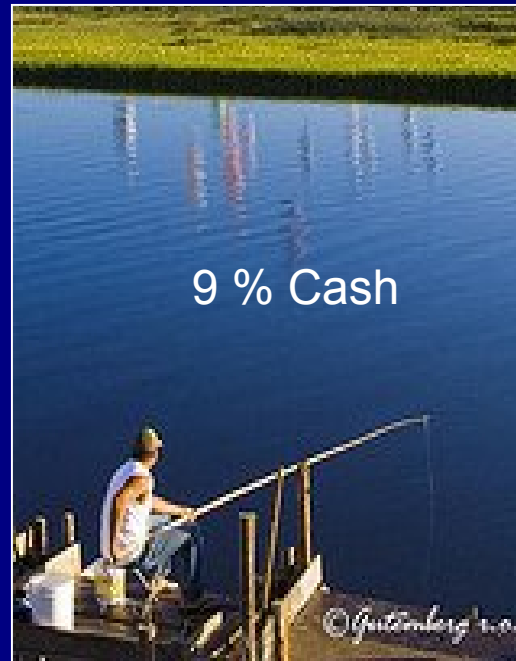
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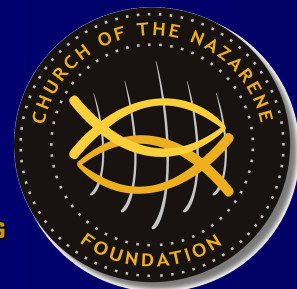
# The Local Church has been Fishing for Resources from a Very Little Pond



Weekly Offerings



Americans hold just 9% of their wealth in cash equivalent assets.



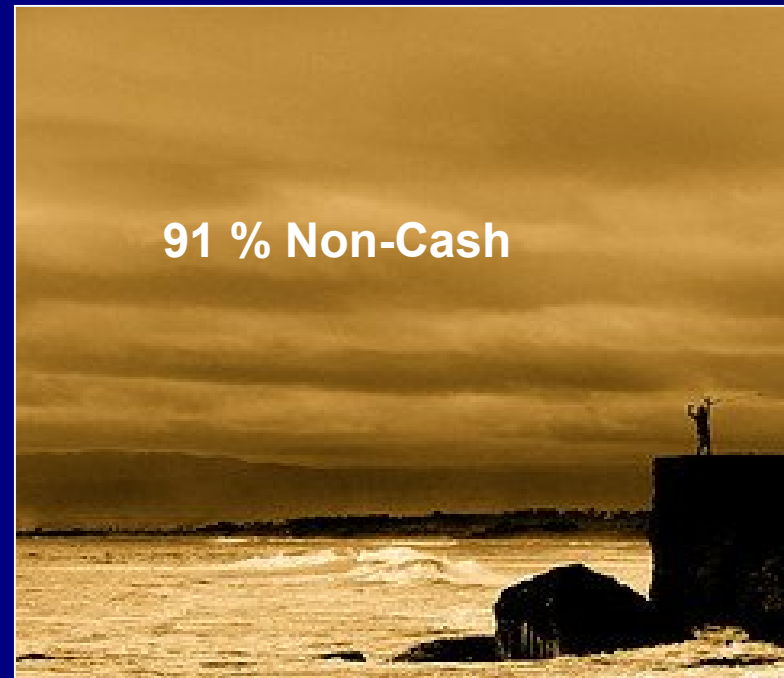
# Imagine Fishing from an Ocean of Resources

While 91% of wealth is held in non-cash assets such as:

- Real estate
- Retirement funds
- Business Interests
- Stocks, bonds & mutual funds
- Residences



# Legacy Ministry Goes Beyond the Offering Plate



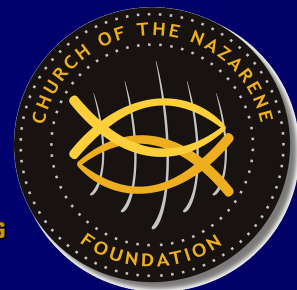
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# Legacy Ministry Looks Ahead to the Future

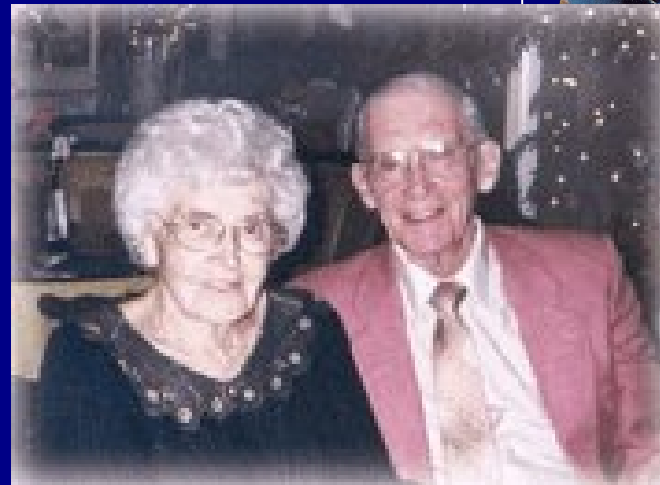


The “builders” generation  
(Age 65+)  
is passing away  
at the rate of  
5000 per day.

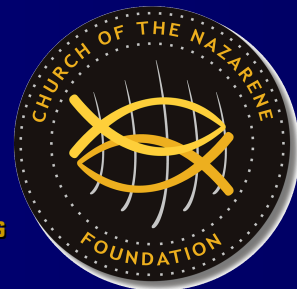


# Ministry Resources are Vanishing!

In many cases financial  
resources are passing from  
the FAITHFUL . . .



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# To the FAITHLESS . . .

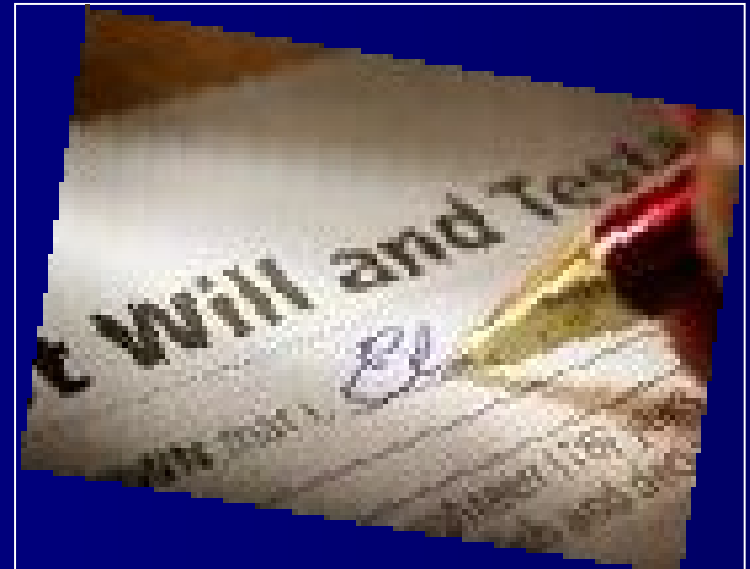


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# Did You Know That

- 60% of people die without a valid estate plan.
- Most estate plans do not reflect current wishes.
- Trillions in generational wealth transfer is occurring.
- Christians are very receptive to making estate plan gifts to their church.



# Why so little and . . .

Individuals who do have an estate plan leave an average of 1% to their church.



Why do many church members who do have estate plans include other nonprofits, but overlook the place they have worshipped for many years?



**We are told . . .**

**"No one asked me."**



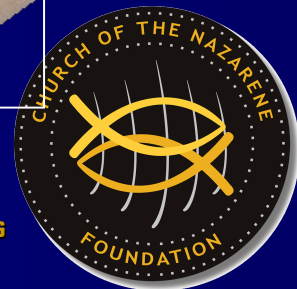
***"You do not have, because you do not ask . . ."*** - James 4:2b

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# Your Church Could Benefit from this Wealth Transfer of Non-cash, Legacy Gifts. Will it?

- Real Estate
- Business Interests
- Personal Property
- Estate Gifts



# Legacy Gifts are Typically Large

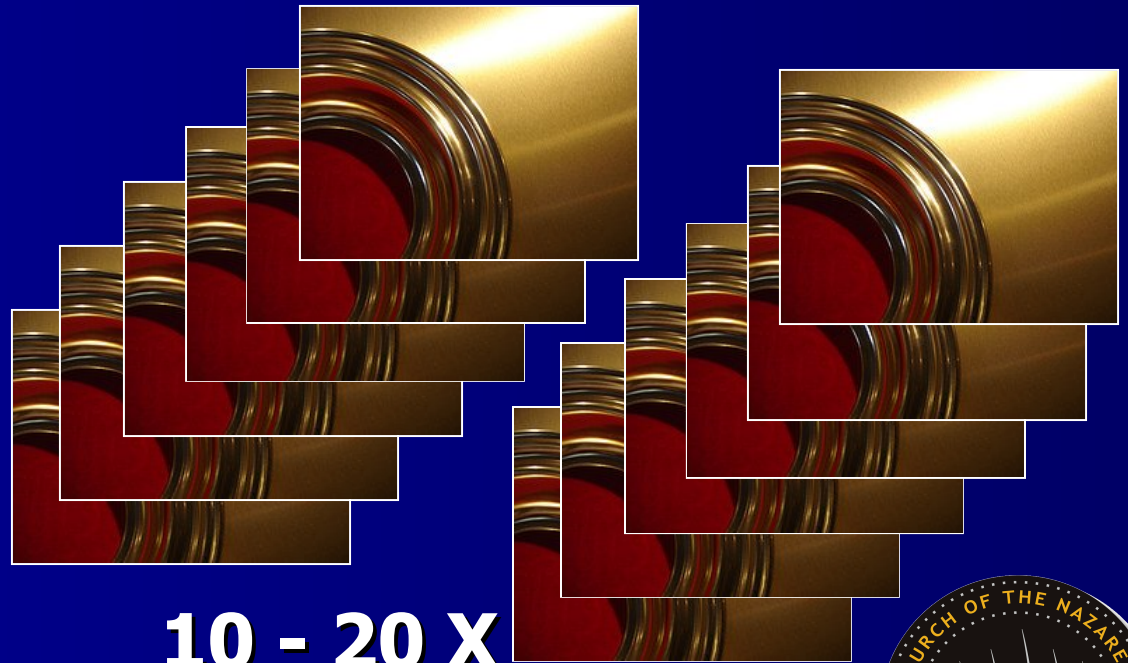
Typical  
Legacy Gift



**\$17,240 – \$34,480**

Annual Cash  
Giving

**\$1,724**



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# For Your Members a Legacy Ministry Will



- Help them make an effective estate plan for the benefit of their family and the Kingdom
- Give them an opportunity to leave a faith legacy
- Assure them that their gifts will be managed wisely and used as they wish
- Provide substantial tax savings for many

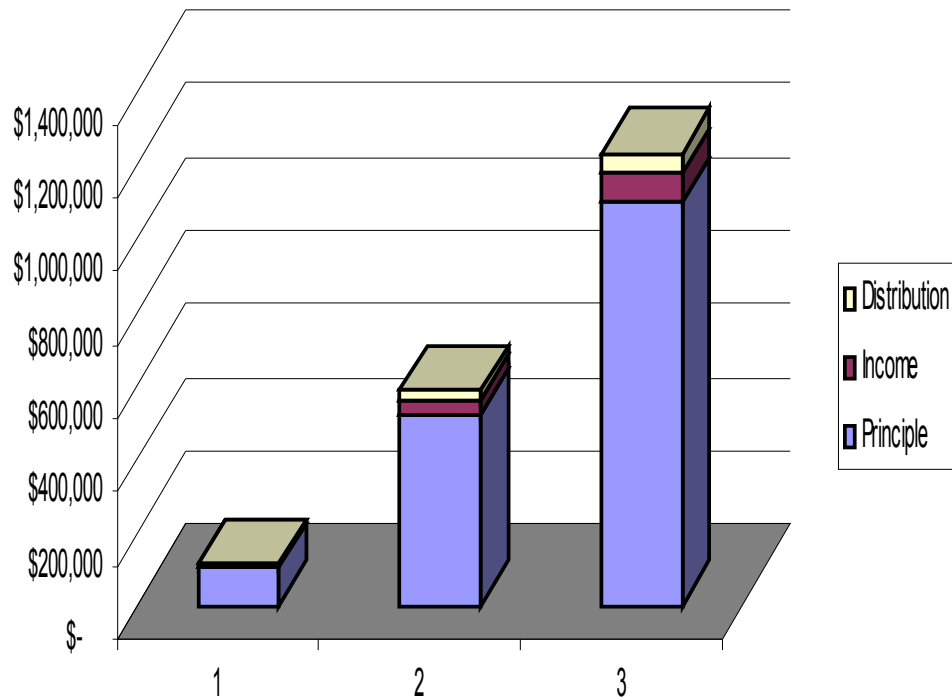


# A Legacy Ministry in Your Church Will

- Connect your ministry vision with the donors' heart
- Expand ministry opportunities
- Build an endowment
- Capture the generosity of the faithful
- Tap new resources for giving
- Increase annual giving

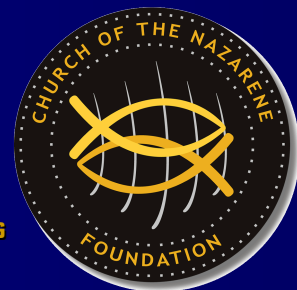


# Consider How an Endowment Expands Ministry



Year	Principal	Income	Distribution
1	\$ 100,000	\$ 7,000	\$ 5,000
5	\$ 520,404	\$ 36,428	\$ 26,020
10	\$ 1,094,972	\$ 76,648	\$ 54,749

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# Legacy Ministry - partner with us

## Funding for Today and Tomorrow

- A legacy ministry for every Nazarene congregation.
- Pick from one of three programs that matches your congregation best.



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# Level One – "Legacy Awareness"



- Articles for your publications.
- Bulletin "sound bites" to promote awareness.
- Website link to the CNF website for examples, stories and tax information.
- Brochures for distribution and display

**COST: Materials only**



# Level Two – "Legacy Launch"



Level One Services plus...

- Sample pastoral letters.
- Development of policies and procedures for your local church.
- Customized pages on your church website to encourage non-traditional gifts to your church.
- Annual visit from CNF staff for presentations and gift planning appointments.
- Remote assistance to implement gift strategies by your members.

COST: \$6,000-\$9,000/year, plus travel and materials.

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# Level Three – "Legacy Ministry"



Level One and Level Two Services plus...

- Establishment of a Legacy Ministry Team
- Bulletin Inserts
- Newsletters
- Legacy Ministry Launch Sunday Planning
- Coordination with Local Professional Advisors
- Gift Recognition Celebration
- Spring and fall visits from CNF staff for Legacy Seminar and individual, confidential consultations
- On-site Assistance with Donors Until Completion of Planned Gifts

COST: Sliding scale plus travel and materials.

Performance Guarantee



# The Church of the Nazarene Foundation

A professional staff to partner with your local church to create a legacy ministry and



Mel McCullough



Ken Roney



Bob Crew, CFA, CFP®



Daniel Jones



Harold Henderson



Catherine Jay



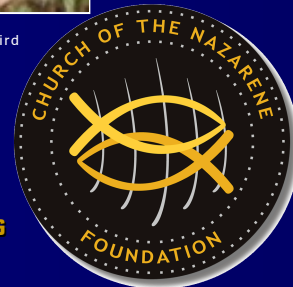
Stephanie Conner



Sheila Bird

...quality planned giving tools to connect gifts with your ministry.

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# Your Church can have a Legacy Ministry!

- Quality Partners and Services



- Expertise and Experience

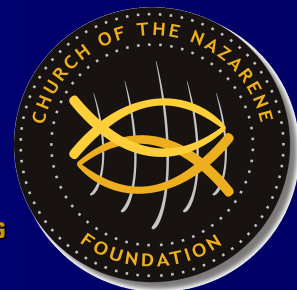
- CEP – CPA
- JD – MBA (2)
- CFP® – CFA

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# CNF Provides

- Strategic Planning
- Bi-annual Legacy Workshops
- Year-round Marketing
- Personal Legacy Planning
- Coordination with Local Advisors
- Timely Tax Saving Opportunities
- Follow-up and Follow-through



# CNF Uses Planned Giving Tools Such As

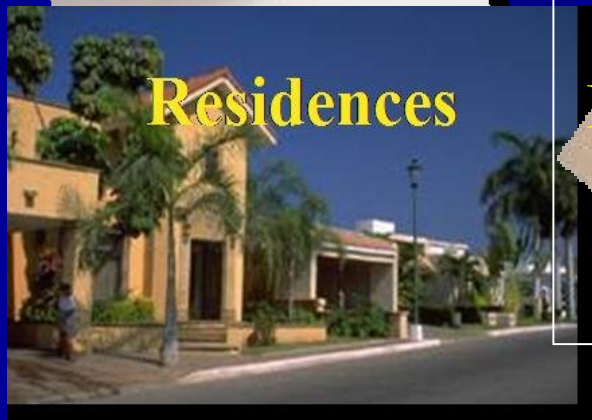
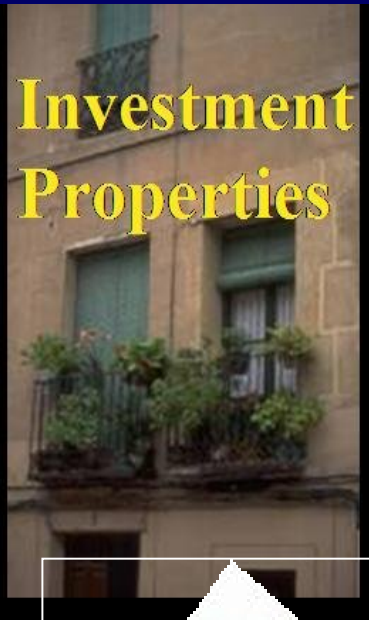
- Charitable Remainder Trusts
- Charitable Gift Annuities
- Donor Advised Funds
- Appreciated Property Gifts
- IRA or Pension Plan Gifts
- Charitable Lead Trusts
- Endowment Management



# We Will Help You Maximize



Investment  
Properties



Residences



Appreciated  
Stock

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# Choose the Plan that is Best for Your Church

- Legacy Awareness
- Legacy Launch
- Legacy Ministry



# Legacy Ministry

Funding for Today and Tomorrow



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