

Other Services

In addition to inheritance planning seminars, the Christian Church Foundation will provide, at no cost to the congregation, other seminars. Topics include:

- Specific planned giving opportunities, such as charitable gift annuities and charitable remainder trusts.
- How to create a permanent fund policy, including some of the pitfalls to avoid.
- The investment of permanent fund resources to protect the initial investment from inflation while providing dollars for ministry.

To schedule one of these seminars, call the Foundation toll-free at (800) 668-8016.

*The Christian Church
Foundation helps Disciples make
a difference forever and discover
the joy of serving Christ through
sharing their resources.*



Helping Disciples Make a Difference

130 East Washington Street
P.O. Box 1986
Indianapolis, IN 46206-1986
(317) 635-3100 (800) 668-8016
FAX (317) 635-1991
<http://www.disciples.org/ccf>

04073000

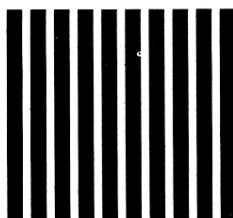
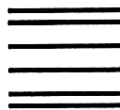
A Guide to

Preparing for an Inheritance Planning Seminar

with Leadership from the
Christian Church
Foundation



BUSINESS REPLY MAIL
FIRST-CLASS MAIL PERMIT NO. 19 INDIANAPOLIS IN
POSTAGE WILL BE PAID BY ADDRESSEE
CHRISTIAN CHURCH FOUNDATION
PO BOX 1986
INDIANAPOLIS IN 46209-9673



NO POSTAGE
NECESSARY
IF MAILED
IN THE
UNITED STATES



Inheritance Seminar Promotional Materials

<u>Item</u>	<u>Quantity</u>	<u>Other Items Available</u>
Posters: 11x17 color posters promoting legacy giving and the seminar	_____	_____ Newsletter articles: These articles promote the seminar and other issues related to inheritance planning.
Bulletin Insert 1: Black and white insert for use the Sunday prior to the seminar; the congregation makes the necessary copies	_____	_____ Sample invitation letter: Sent via e-mail, this letter serves as a prototype for an invitation to the seminar from the pastor or other church leader.
Bulletin Insert 2: Full color insert for use at least two Sundays prior to the seminar; this focuses on a specific aspect of planned giving. This insert is pre-printed and mailed to the congregation	_____	_____ Have a Foundation representative call me.

Name: _____

Street Address: _____

City, State, Zip _____

Congregation _____

City, State _____

E-mail address: _____

Daytime Phone: _____

Preparing For the Seminar

Using the Foundation's promotional materials takes care of a major part of promoting the event. There are some additional steps you can take to guarantee a successful event:

- Identify individuals who would directly benefit from the information provided, and extend them a special invitation. These individuals would include persons over age 60, individuals without heirs and church leaders.
- Provide a comfortable setting for the seminar. Foundation staff often use Powerpoint, and bring along their own laptops and projectors. Comfortable chairs set in classroom or theater style works. Sound systems are only needed if the room is big and a large crowd is expected.
- Refreshments after the seminar also allow for informative conversations to take place that may open up questions that need further explanation.

The Seminar Itself

The Foundation's seminar typically lasts 60-90 minutes. The presenter will provide some basic information about the Foundation and its ministry, but devote the largest segment of time on:

- The need to have an inheritance plan, including tax considerations and issues of transferring property to heirs;
- A discussion of issues related to legacies and providing for heirs and the church;
- Different giving instruments and techniques that allow individuals to pass along property to heirs and the church;
- Life-income gifts, such as charitable gift annuities and charitable trusts, that can provide a stream of payments to the donor or designated individual(s) with the church as the remainder beneficiary;
- How retirement assets can best be passed on to others.

Most seminars mix lecture with discussion, and questions by participants are encouraged. No products are sold and the emphasis is on gifts that will benefit the congregation.

An Introduction

Introducing members of your congregation to concepts of inheritance planning, planned giving and the Christian stewardship of accumulated resources is one of the greatest gifts you can give. Best of all, you don't have to do it alone — the Christian Church Foundation is here to make it simple. Typically the largest gift a person can make to the congregation is at death by remembering the church in the Last Will & Testament. This and other types of planned giving that benefit congregations allows individuals to live out their Christian faith in perpetuity, which also can be an inspirational witness to others.

Often, however, the key step involves getting information to the congregation — and a free, no-obligation seminar presented by staff from the Christian Church Foundation is one of the easiest ways.

The Beginning

The very first step is to contact the Christian Church Foundation at (800) 668-8016 and set up a date with your zone representative. To effectively promote the seminar, churches typically need at least two months, and matching the congregation's calendar to the Foundation staff member's calendar may mean planning further out. Sometimes the seminar will be preceded by a fellowship dinner, or some churches simply provide refreshments after the seminar. If the seminar is held on a Sunday, sometimes the Foundation representative can be asked to preach during the worship service. Best of all, the Foundation charges nothing for these types of services; the Foundation's ministry is geared toward partnering with congregations to help church members consider legacy issues.

Event Promotion

The Foundation provides excellent resources to help congregations promote inheritance planning seminars. The list of materials available is on the tear-out portion of this brochure; simply identify what your congregation can use, identify quantity, provide contact information, detach and mail.