



Planned Giving

& TRUST SERVICES



NORTH AMERICAN DIVISION PLANNED GIVING & TRUST SERVICES

Dennis R. Carlson and Scot Coppock



SALVATION OF SOULS

“But they manifest no real love for Christ, no earnest interest in the salvation of precious souls.



PLANNED GIVING

“But this duty is just as sacred as the duty to preach the word to save souls”

Counsels on Stewardship page 323



SALVATION OF SOULS

“What marvel that the Christian life of this class is at best but a dwarfed and sickly existence! Unless such persons change their course, their light will go out in darkness.”—The Review and Herald, May 16, 1882



CHRISTIAN REFORMERS

“Let it ever be kept in mind that the present selfish system of disposing of property is not God’s plan, but man’s device.

**Change
Makers**



CHRISTIAN REFORMERS

“Christians should be reformers, and break up this present system, giving an entirely new aspect to the formation of wills.



CHRISTIAN REFORMERS

“Let the idea be ever present that it is the Lord’s property which you are handling. The will of God in this matter is law.”

Testimonies for the Church 4:478–483.



BANK OF HEAVEN

“Let none withhold their mites, and let those who have much rejoice that they can lay up in heaven a treasure that faileth not.



BANK OF HEAVEN

“The money that we refuse to invest in the work of the Lord, will perish. On it no interest will accumulate in the bank of heaven.” Testimonies for the Church (1855). (Vol. 9, pp. 131–133)



Adventist Learning Community PGTS Certification Course



Planned Giving and Trust Services

COURSE PROGRESS

Module Content

Course Progress ✕

12% COMPLETE

Introductory Module Lesson 0

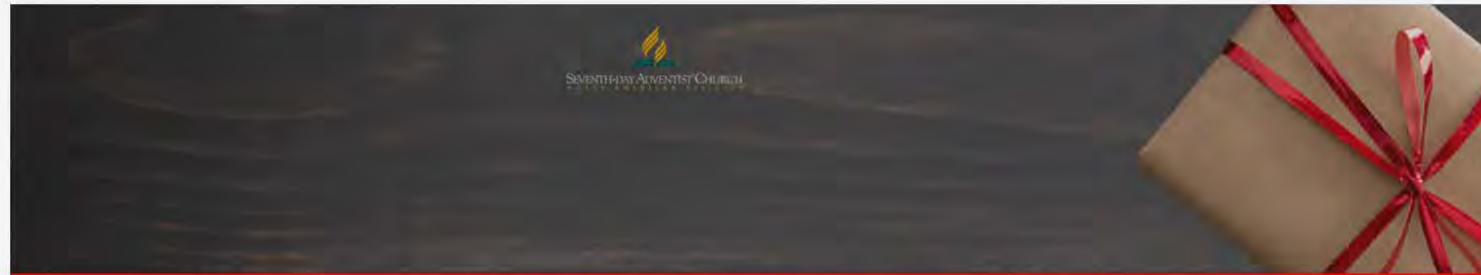
- Module Content
- Introductory Module Discussion
- Quiz 0

Module 1 Lesson 1 - Final Act of Biblical Stewardship

- Final Act of Biblical Stewardship
- Module 1 Lesson 1 Discussion
- Quiz 01

Module 2 Lesson 2 - Estate Planning: A Christian Perspective

- Estate Planning: A Christian Perspective
- Module 2 Lesson 2 Discussion - Cohort 2
- Quiz 02



Introductory Module, Lesson 0

Lesson Summary:

- This lesson is your introduction to the NAD Planned Giving and Trust Services Certification Course in the Adventist Learning Community.
- How the certification course will operate, the requirements for passing the course and the final exam, and you will familiarize yourself with the ALC learning environment.

Learning Outcomes:

By the end of this learning module you will be able to:

- Navigate through the ALC learning environment.
- Understand the course requirements.
- Plan how you will complete the weekly requirements for the course.

Books & Resources:

- [Course Syllabus](#) - Please read the entire course syllabus.
- [Comprehensive List of Learning Activities](#) - Look



Adventist Learning Community PGTS Certification Course

2020 Cohorts	Class Start Date	Registration Opens	Registration Closes	Review & Exam
Spring	Jan 27, 2020	Oct 1, 2019	Jan 16, 2020	May 19 – 21, 2020
Fall	Aug 10, 2020	Apr 1, 2020	Jul 30, 2020	Dec 1 – 3, 2020



Adventist Learning Community PGTS CPE Courses

CPE Courses Currently Available CPE Value

- Marketing Planned Giving (4)
- Real Estate (4)
- Trust Administration (4)
- Advanced Planned Gifts (5)
- Trust Accounting (5)
- Canadian Planned Giving (6)



Adventist Learning Community PGTS CPE Courses

Available January, 2020

PGTS Accreditation Process (4)

Donor Stewardship (4)



Poll Question

Do you anticipate taking a PGTS CPE course through the Adventist Learning Community in the next couple of years?

Results



Research Summary

DONORS/PGTS - BEHAVIORAL INSIGHTS

July 24 - 2019

Prepared for:

Planned Giving & Trust Services | Dennis Carlson and Scot Coppock



SUMMARY CONCLUSIONS

WHAT ARE THE KEY TAKEAWAYS/INSIGHTS

- Participants displayed difficulty in being able to differentiate between the mission of PGTS and stewardship;
- The overarching perception is that PGTS only prepares wills;
- Participants were unclear as to whether PGTS is a ministry or a service;
- Further, if it is a ministry participants were uncertain as to whom PGTS is designed to serve – the church or its members;
- A bias exists that the church misappropriates funds and thus participants displayed a lack of trust in donating unrestricted funds;
- Similarly, participants **expressed concern that in donating through PGTS they would not have the control to be able to direct donations to their desired areas** – this was indicated as a barrier to engaging with PGTS;
- Similarly, there was a general sentiment that the Church just ‘wants their money’ .



Planned Giving & Trust Services helps individuals experience the joy of life-long giving. Our goal is to connect a donor's passion with the mission and work of the Seventh-day Adventist Church to expand the Kingdom of Heaven.

**Experience
the Joy of Giving**



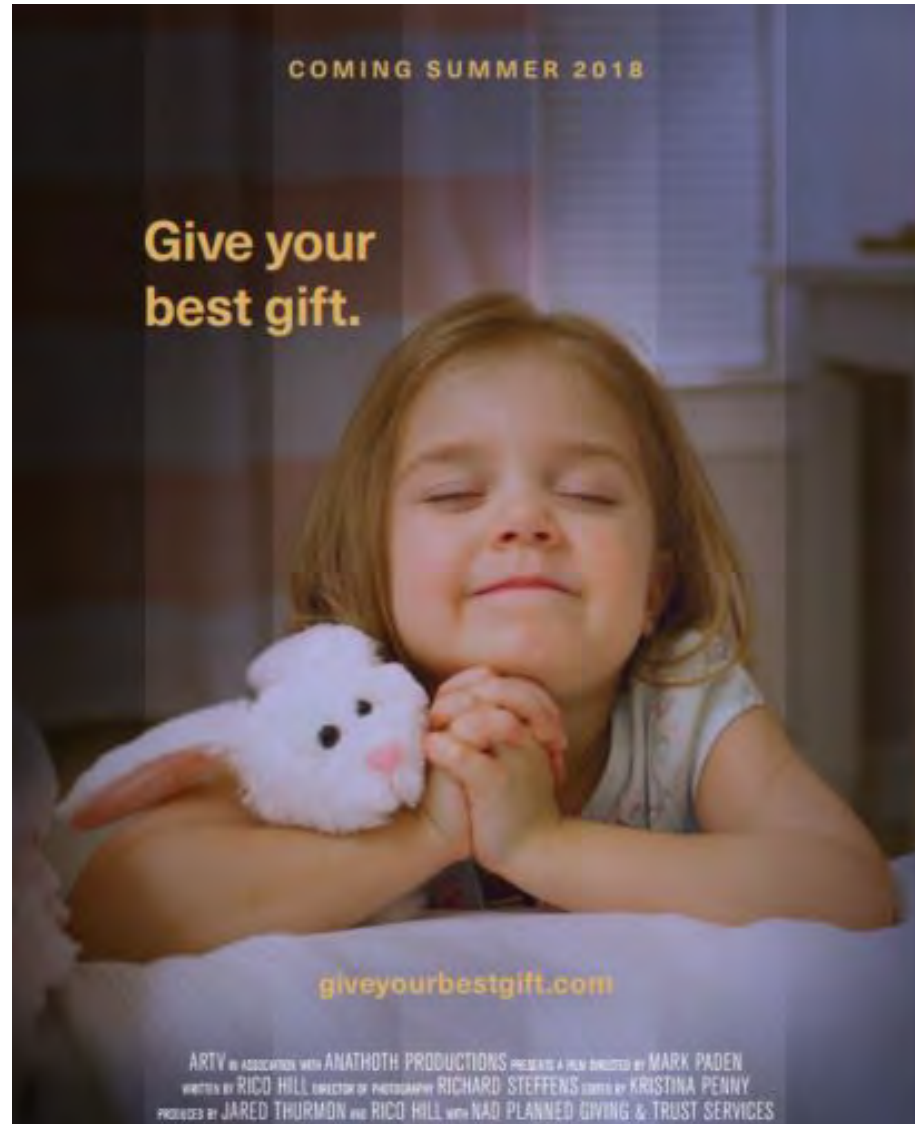
ADVERTISEMENT EXAMPLES

Marketing Theme:
“Experience the
Joy of Giving”



The advertisement features a photograph of a family—a man in a hat, a woman in a plaid shirt, and a young girl in overalls—crouching in a garden and planting a small green seedling. The man is holding a watering can. The scene is set outdoors with trees in the background. At the top, the text 'EXPERIENCE THE JOY OF GIVING' is displayed, with 'THE JOY' enclosed in a green rectangular box. In the bottom left corner of the photo area, the Planned Giving & Trust Services logo is visible. At the bottom of the advertisement, the text 'Have the peace of mind that they will be taken care of—no matter what. willplan.org' is written in a small, dark font.

GIVE YOUR BEST GIFT



GREAT GIVING



GREATGIVINGSERIES.COM

A 12-PART SERIES ON PHILANTHROPY





GREAT GIVING

A PODCAST ON PHILANTHROPY

GREATGIVINGSERIES.COM



Poll Question

Would you be willing to pay a subscription fee to use this digital marketing packet?

Results



Updated Website



[Contact Us](#)

[Home](#)

[Who We Are](#)

[Videos](#)

[Donor Stories](#)

[FAQs](#)

[Downloads](#)

[Other Links](#)

[For Staff](#)



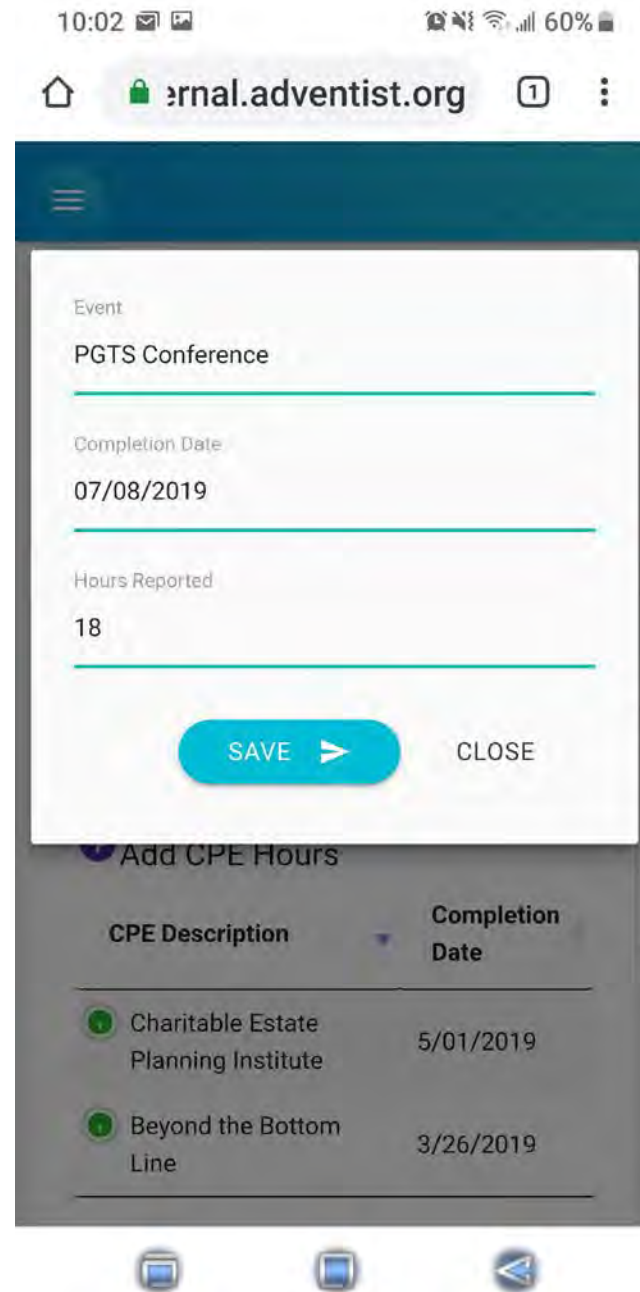
**The choices
you make
in life**
reflect your
deepest values.



CREATING SECURITY FOR YOU



Portal Updates



NAD WP REVISION

- Simplify Policies
- Moved all Guidelines to WP or Manual
- Reordered Policy numbers



NEW WORKING POLICY

- Record Retention
- Active/Inactive Certification
- CPE Carry forward of up to 8 credit hours



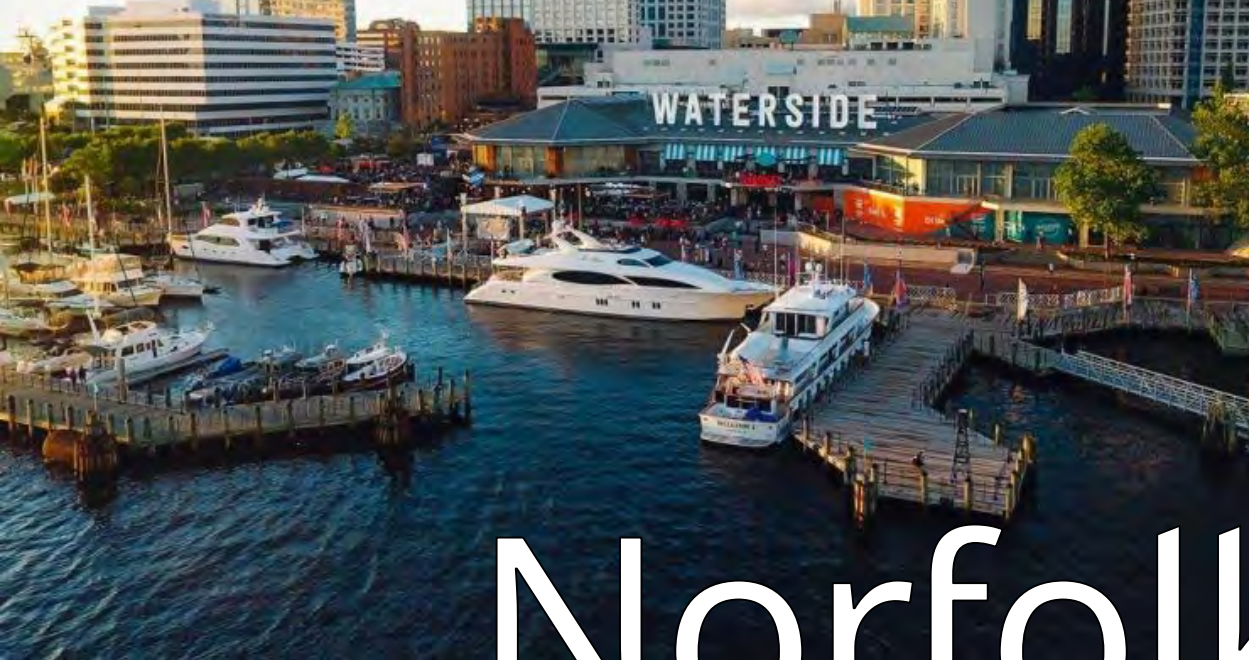
Future Projects

- 2021 Conference Location
- PGTS Database Creation
- Updated Annual Report
- Revise PGTS Standards
- Revise PGTS Manual



2021 PGTS Conference





Norfolk, VA



Aug 9 - 12, 2021





FileMaker®



NAD PGTS Database



What are the 20 best donor management software solutions of 2019?

- 1 Raiser's Edge NXT
- 2 DonorPerfect
- 3 Bloomerang
- 4 Planning Center
- 5 eTapestry
- 6 NetSuite for Nonprofits
- 7 MemberClicks
- 8 Salsa CRM
- 9 Qgiv
- 10 WizeHive
- 11 easyTithe
- 12 Network for Good
- 13 Wild Apricot
- 14 NeonCRM
- 15 Kindful
- 16 Donor Tools
- 17 Abila
- 18 DonorView
- 19 Virtuous CRM
- 20 Keela



Poll Question

Are you interested in having a PGTS Database made available for a modest subscription fee?

Results



NAD Annual PGTS Report

North American Division
Annual
Planned Giving & Trust Services Report for 2019
(Due by March 2, 2020)

NAME OF ORGANIZATION: _____

NUMBER OF EMPLOYEES: Total persons: _____ Total FTE: _____
(Give Full Time Equivalent (FTE) for time spent working in Planned Giving Trust Services activity)

Planned Giving & Trust Services Department Cost last year \$ _____

Planned Gift Development Activities: please list the number of planned giving development activities conducted last year.

Presentations

Churches _____ Number in attendance _____

Other venues _____ Number in attendance _____

New donor visits _____

Proposals presented _____

Planned gifts created benefiting your organization _____

Donor stewardship visits _____

PGTS Marketing activities: please list the number of planned giving focused marketing activities conducted last year.

Mass-mailings to members and clients _____

Personalized mail (e.g. birthday cards, anniversary cards, etc.) _____

Website visits _____ Pages viewed _____

Total eNewsletter subscriptions _____ Subscriptions added _____

Print advertisements _____

Union publications _____ Conference publications _____ Other Publications _____

Internet advertisements _____

Social media advertisements _____

Donor stories written _____

Videos produced _____

A. <u>Trust/Annuity Agreement Totals</u> (Net balances for each fund or account, as shown at end of last year)		
	<u>Number</u>	<u>Dollar Amount</u>
Revocable Trusts	_____	\$ _____
Irrevocable Trusts	_____	\$ _____
Charitable Remainder Trusts	_____	\$ _____
Annuities	_____	\$ _____
Self-Administered Trusts	_____	\$ _____
Other Agreements:	_____	\$ _____
Total of All Agreements		\$ _____
B. <u>Wills</u> Number written last year _____		
Total number of Wills in your vault (original and/or copies) (This total includes all such Wills held, not just those written last year)		
C. <u>Maturities, Income, and Special Gifts</u> (see note below)		
		<u>Dollar Amount</u>
From Trusts		\$ _____
From Wills		\$ _____
From Annuities		\$ _____
From Outright Gifts (as a result of PGTRS activity)		\$ _____
From Beneficiary Designations (POD from bank account, IRA, life insurance, brokerage account etc.)		\$ _____
Other:		\$ _____
Total Income and Maturities for the Lord's Work Last Year		\$ _____
D. <u>Largest Projects Under Management</u> (over \$1 million)		
		<u>Dollar Amount</u>
(Trusts/Estates/Gifts)		
1)	_____	\$ _____
2)	_____	\$ _____
3)	_____	\$ _____
4)	_____	\$ _____
5)	_____	\$ _____

NOTE:

C. Maturities, Income, and Special Gifts: Report only amounts received by or distributed to the church and its affiliated organizations.

Do not report amounts your organization receives from other church entities.

Include amounts your organization receives from non-SDA church entities such as private Trustee, Estate, attorney, bank or trust company.

Include assets received other than cash at fair market value on date of delivery.

D. Largest Projects Under Management: ARM needs this information for insurance purposes. Identify each project by number and project type (e.g. CRT101) **no names**

Union Conference: Please attach a copy of each conference/organization report to union combined report.



Annually Tracking

- Presentations
- New Donor Visits
- Gift Proposals Presented
- Planned Gifts Created
- Donor Stewardship Visits



Annually Tracking

- Marketing Activities
 - Mailings
 - Website Visits
 - Newsletters sent
 - Print Advertisements
 - Donor Stories Published
 - Videos Produced



REVISE PGTS STANDARDS

ACCREDITATION STANDARDS

All requirements are expected to be complied with at the **time of accreditation**.

PERSONNEL

1. All Planned Giving and Trust Services personnel who have been **performing any discretionary trust/estate management or development functions** for at least one year have been certified. (1984 North American Division Annual Council)
2. Current signed conflict of interest statements are on file for all appropriate individuals. (NADWP E 85 10 and 20)
3. All Planned Giving and Trust Service personnel are adequately covered by a fidelity bond. (NADWP S 04 47)

LEGAL COUNSEL

4. All trusts, wills, charitable gift annuities, and all other legal documents are prepared by, or under the supervision of, legal counsel in such a manner that the **attorney accepts responsibility for the documents**. (NADWP S 40 05, S 40 20, and 1983 NAD Annual Council)
5. The Professional Ethics for Corporate Legal Counsel policy is being complied with including:



REVISE PGTS MANUAL

PLANNED·GIVING·&·TRUST·SERVICES¶
NORTH·AMERICAN·DIVISION·MANUAL¶



Planned·Giving·&·Trust·Services¶
General·Conference·of·Seventh-day·Adventists¶
12501·Old·Columbia·Pike¶
Silver·Spring,·Maryland·20904¶
Copyright·2011¶



Planned Giving & Trust Services Maturities Report 2018

North American Division (GC & Unions) – \$33,428,853.06

General Conference	\$1,281,310.33
Atlantic Union Conference	1,607,866.91
Canadian, Seventh-day Adventist Church in	0
Columbia Union	945,734.56
Lake Union Conference	1,021,577.76
Mid-America Union Conference	2,605,131.82
North Pacific Union Conference	8,134,394.48
Pacific Union Conference	11,105,811.45
Southern Union Conference	6,087,698.75
Southwestern Union Conference	639,257.00



Planned Giving & Trust Services Maturities Report 2018

GC Institutions - \$27,104,001.93

Andrews University	\$1,929,323.00
Christian Record Services	1,343,329.21
It Is Written	1,616,467.72
Loma Linda University	19,558,147.00
Oakwood University	0
Voice of Prophecy	2,656,735.00



North American Division Planned Giving & Trust Services Maturities Report 2018

TOTALS

North American Division (GC & Unions)	\$33,428,853.06
Institutions	<u>27,104,001.93</u>
GRAND TOTAL	\$60,532,854.99



General Conference Planned Giving & Trust Services Maturities Report 2018

2018 TOTALS

North American Division (GC, Unions & Institutions)	\$60,532,854.99
Other Divisions	<u>13,401,770.25</u>
GRAND TOTAL	\$73,934,625.24





**Contributions to the advancement
of the mission of the Seventh-day
Adventist Church through Planned
Giving & Trust Services since 1968
= over \$2 Billion.**



Please Stand If You Have Been in Planned Giving & Trust Services for...

20+ Years

30+ Years

35+ Years

40+ Years



Please Stand If

You are not yet PGTS Certified

You became PGTS Certified
After the 2017 Tucson Conference



Q & A





Planned Giving

& TRUST SERVICES

