

NORTH AMERICAN DIVISION

PLANNED GIVING AND TRUST SERVICES

STATE OF THE DIVISION REPORT



Planned
Giving
& TRUST SERVICES



VERY END OF TIME

Just as long as we are in this world, and the Spirit of God is striving with the world, we are to receive as well as to impart favors. We are to give to the world the light of truth as presented in the Sacred Scriptures, and we are to receive from the world that which God moves upon them to do in behalf of His **cause**. White, E. G. (1940). Counsels on Stewardship (p. 183). Review and Herald Publishing Association.



GOVERNOR VISITS CHURCH



ONE PRINCIPLE OF TRUTH

We should become acquainted with men in high places, and by exercising the wisdom of the serpent, and the harmlessness of the dove, we might obtain advantage from them, for God would move upon their minds to do many things in behalf of His people.—Testimonies to Ministers and Gospel Workers, 197, 198.

White, E. G. (1940). Counsels on Stewardship (p. 185). Review and Herald Publishing Association.



PRIVILEGED TO RECEIVE

He has an abundance in our world which He has placed in the hands of men, by which the hungry might be supplied with food, the naked with clothing, the homeless with homes. The Lord would move upon worldly men, even idolaters, to give of their abundance for the support of the work, if we would approach them wisely, and give them an opportunity of doing those things which it is their privilege to do. What they would give we should be privileged to receive.

White, E. G. (1940). Counsels on Stewardship (p. 185). Review and Herald Publishing Association.



2023 ADVERTISING ASSETS

The screenshot displays the 'Planned Giving & Trust Services' website for the Seventh-Day Adventist Church. The page features a dark blue header with navigation links: 'CREATE YOUR PLAN', 'STAFF SITE', 'SEARCH', 'MENU', 'About', 'Services', 'FAQ', 'Resources', and 'Contact'. The main content area is titled 'User Stories' and includes a paragraph: 'Below you will find stories of generous people like you who want to make a planned gift. Some are interested in giving now, using the assets God has blessed them with, while others want to give later through their estate. However you are interested in supporting the Lord's work, click through the stories and be inspired on how you too can Experience the Joy of Giving!'. Three video thumbnails are shown: 'BILL AND JILL' (a couple with children), 'SHERRY AND GARY' (a couple), and 'SOPHIA' (an elderly woman). Each thumbnail has a 'Read More' link below it.

Planned Giving & Trust Services
SEVENTH-DAY ADVENTIST CHURCH

CREATE YOUR PLAN STAFF SITE SEARCH MENU

About Services FAQ Resources Contact

About

User Stories

Below you will find stories of generous people like you who want to make a planned gift. Some are interested in giving now, using the assets God has blessed them with, while others want to give later through their estate. However you are interested in supporting the Lord's work, click through the stories and be inspired on how you too can Experience the Joy of Giving!

BILL AND JILL

SHERRY AND GARY

EVERYONE NEEDS A WILL

Bill and Jill are in their early 30s. They have two children ages 1 and 4. They are trying to instill in them principles of faithful giving to their church.

[Read More](#)

SOPHIA

Updating a Will

Sophia lives in Arizona, where she and her husband lived a wonderful life together. Juan passed away a few years ago and thankfully they had paid off all their debts prior to that.

[Read More](#)



2022 Marketing

"Your estate plan is a gift allowing your family to focus on **memories** not challenges."

—Lisa Bink
Trustee of Planned Giving and Trust Services
Wills & Estates




Planned Giving & Trust Services

Experiences the joy of giving • willplans.org

"Giving makes an **eternal difference**— for yourself and others."

—Alex Thomas
Planned Giving, Charities, & Estates




Planned Giving & Trust Services

Experiences the joy of giving • willplans.org

"The soul that gives is always **refreshed.**"

—Ray McNeil
Trustee of Planned Giving and Trust Services
Wills & Estates



Planned Giving & Trust Services

Experiences the joy of giving • willplans.org

"The best gifts for the Lord's work come from the **heart.**"

—Peggy Cook
Trustee of Planned Giving and Trust Services
Wills & Estates



Planned Giving & Trust Services

Experiences the joy of giving • willplans.org



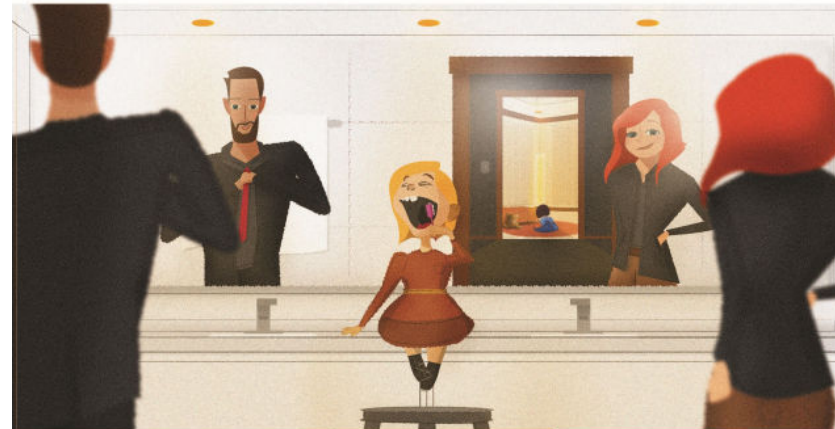
2023 Marketing

Bill and Jill

**now realize more than ever
that life is not guaranteed**

and want to ensure that their kids would be taken care of if something were to happen to them. But life is busy, and they don't know the costs and time considerations of creating a will.

To learn more about Bill and Jill's story,
scan the QR code or visit BillandJill.willplan.org



 **Planned Giving
& Trust Services**

**Experience
the Joy of Giving**



2023 Marketing

Sophia

just lost her husband

One of her most important questions is how to take care of her daughter and still make a significant impact on her local church. Her friend Susan has given her some ideas, but she's still navigating the details.

To learn more about Sophia's journey, scan the QR code or visit [Sophia.willplan.org](https://sophia.willplan.org)



 **Planned Giving
& Trust Services**

**Experience
the Joy of Giving**

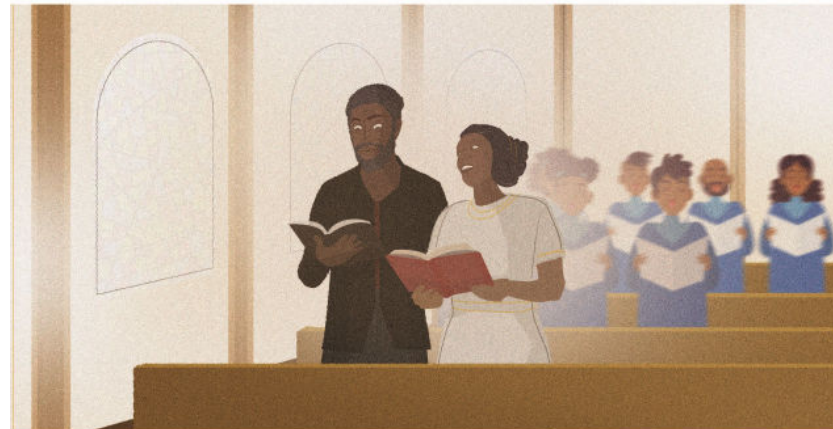


2023 Marketing

Sherry and Gary are ready to retire next year.

They need some advice on tax implications and ways to navigate this next stage in life. They are prepared to get more involved at church but want to ensure their bills are taken care of before they retire and give a significant donation to the children's programs.

To learn more about Sherry and Gary's next steps—
scan the QR code or visit SherryandGary.willplan.org



 **Planned Giving
& Trust Services**

**Experience
the Joy of Giving**



2023 Marketing

Mariah

travels the world

for her work and loves it. But she's feeling the urge to do something more tangible to impact the world around her. Like her investments, she wants to spread her donation to multiple entities to see which can do the most with her funds. She wants to learn how to navigate the tax benefits and connect with the right organizations to make the most of this opportunity.

To learn more about Mariah's story—
scan the QR code or visit [Mariah.willplan.org](https://mariah.willplan.org)



Experience
the Joy of Giving



2023 Marketing

Jim and Donna are in good health,

happily retired, and love their community. They want to pass on their legacy of giving to their grandchildren and want them to have a say in how they begin to make donations with their funds each year. They've called a family meeting to explore interests and gauge how to move forward with exciting contributions that all can see the fruit of.

To learn more about Jim and Donna's journey—
scan the QR code or visit jimanddonna.willplan.org



 Planned Giving
& Trust Services

Experience
the Joy of Giving



'23 - '25 Marketing Plan

Research

Effectiveness of Marketing

Continue

Experience Joy of Giving

Supporting Family & Lord's Work

Promote

Specific Planned Gifts

Current Gifts - SDA DGF, and QCDs

Deferred Gifts – CGAs, and Wills

Move

Inspire Impactful Giving

Call People to Action

Connect Donors to PGTS Depts

Complete the Gifts



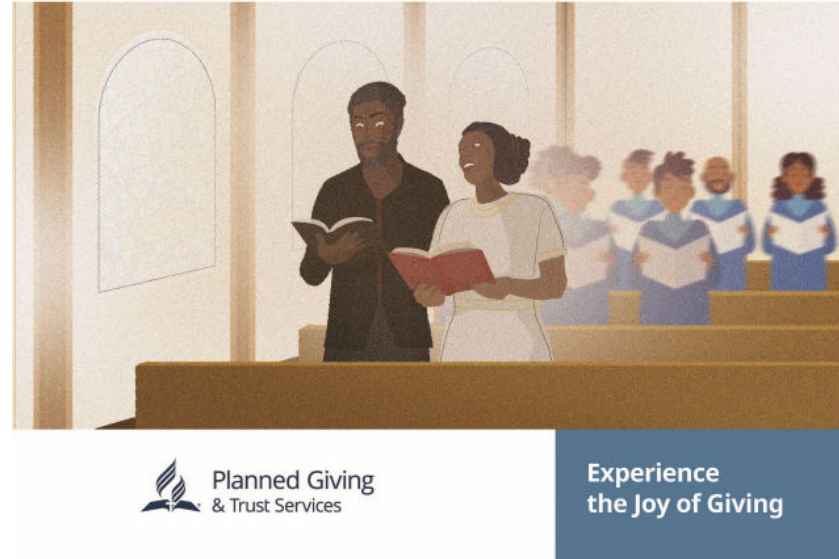
PGTS EXPLAINER ANIMATIONS



2023 ADVERTISING ASSETS

Marketing Assets are available for download here.

<https://staff.willplann.org/marketing/advertisements/>



MISSION IMPACT FUND

Planned Giving
& Trust Services

SEVENTH-DAY ADVENTIST CHURCH

CONTACT ▾ 🔍 SEARCH ☰ MENU

About Services ▾ Videos FAQ Resources ▾



Mission Impact Fund



Mission impact fund 2023 projects

MISSION IMPACT FUND

Distribution Direction for the Division Leaders

| Division | Organization Name | Project | Division | Local Community | Primary Contact Person | PCP Email | Dollar Amount Approved | Division Total |
|----------|--|---|---------------------------------------|------------------------------|-------------------------------|---|------------------------|----------------|
| ECD | Harer SDA Church: Ethiopia Union Mission | Bible in local community | East-Central Africa Division | Addis Ababa, Ethiopia | Titi Bekele | tinane@b@yahoo.com | \$60,000.00 | |
| ECD | Djibouti Adventist Health Center (DAHC) | Arhiba Community Outreach hygiene and sanitation | East-Central Africa Division | Djibouti | Paul Irakoze | irakoze@pau777@gmail.com | \$10,000.00 | \$70,000.00 |
| IAD | Centro de Vida Sana - Health Center | Health Ministry | Inter-American Division (IAD) | Las Manias, Puerto Rico, USA | Julio Gandia Garcia | jlmd7pr@yahoo.com | \$99,000.00 | \$99,000.00 |
| EUD | South Transylvania Conference, Romanian Union | Roma Gabor Project | Inter-European Division (EUD) | Targu-Mures, Romania | Cezar Iliescu | cezariliescu@adventist.ro | \$125,000.00 | |
| EUD | Eglise Adventiste de Geneve-Cluse (French-speaking Church in Geneva) | Geneva Project | Inter-European Division (EUD) | Geneva, Switzerland | Nicolas Walther/Leanado Lopez | nicolas.walther@adventiste.ch / leo.lopez@adventiste.ch | \$150,000.00 | \$275,000.00 |
| NAD | Selawik SDA Group/Alaska Conference/Arctic Mission | Alaska Native Safe House | North American Division | Selawik, AK, USA | Tandi Perkins | tandi.perkins@alaskaconference.org | \$20,000.00 | |
| NAD | Auburn Seventh-day Adventist Church Community Services | Community Showers | North American Division | Auburn, CA, USA | Pamela Haddad | auburnacs2@gmail.com | \$25,000.00 | |
| NAD | Ann Arbor Seventh-day Adventist Church | Hope Center | North American Division | Ann Arbor, MI, USA | Scott Nelson | scottreidnelson@gmail.com | \$65,190.00 | |
| NAD | Moab Manna a Ministry of the Moab Seventh-day Adventist Church | Potato Ministry | North American Division | Moab, UT, USA | Nathan James | njames@nevadautah.org | \$65,000.00 | |
| NAD | Emmanuel Brinklow SDA Church | Brinklow Cares/Food distribution | North American Division | Ashton, MD, USA | Lynette YancyRobinson | yanceyL@cyiris.com | \$75,000.00 | |
| NAD | Centre Vie Meilleure des Bois-Francis | Anxiety , depression, daycare center, and health fair | North American Division | Warwick, ONT, CA | Marianne Lemay | auloscience@hotmail.com | \$135,000.00 | |
| NAD | Denver Park Hill Seventh-day Adventist Church | Block Party | North American Division | Denver, CO, USA | Eddie Polite | denverparkhillpastor@gmail.com | \$18,900.00 | |
| NAD | Adairsville SDA Church | Video Bible Themes Stories | North American Division | Adairsville, GA, USA | Jared Thurmon | thurmonj@gc.adventist.org | \$16,000.00 | \$420,090.00 |
| SID | Mtapa Seventh Day Adventist Church | Community Center of Influence | Southern Africa-Indian Ocean Division | Gweru, Zimbabwe | Walter Ruzive | | \$72,725.00 | |
| SID | Great Hope Adventist Church | Great Hope Day Care & Play Center | Southern Africa-Indian Ocean Division | Masvingo, Zimbabwe | Lovemore Chirobe | lovechenge@gmail.com | \$69,741.00 | |
| SID | Mafuba SDA Church | Mafuba Youth Friendly Center | Southern Africa-Indian Ocean Division | Masvingo, Zimbabwe | Elder Tazvinga | makayac@ccc.adventist.org | \$78,835.00 | \$221,301.00 |
| SUD | Eastern Jharkhan Section of SDA | Community classes | Southern Asia Division | Karmatar, India | President | presidenteis@niwadventist.org | \$117,549.00 | \$117,549.00 |
| TED | Helsinki | Urban Center of Influence | Trans European Division | Tempere, Finland | Nanad Jeuranovic | njeuranovic@ted.adventist.org | \$300,000.00 | \$300,000.00 |
| WAD | Maranatha- Philadelphia Church | Youth Center | West Central Africa Division | Lome, Togo | Enyonam Agbedigwe | agbedi2@yahoo.fr | \$140,000.00 | \$140,000.00 |
| Total | | | | | | | \$1,642,940.00 | \$1,642,940.00 |



MISSION IMPACT FUND

MIF Information
available here.

Planned Giving
& Trust Services

SEVENTH-DAY ADVENTIST CHURCH



www.willplan.org/services/missionimpactfund/



ADVENTIST DONOR GIFT FUND



GENERAL PARAMETERS

- SDA only Account
25%
- Discretionary Account
75%
- Minimum Donation to open ADGF \$1000
- Minimum Additional donations \$250
- Minimum Balance \$0
- Minimum Grant to Charity \$250
- Grants may be Anonymous Yes
- Investment Strategy choices 11 choices



PARTICIPATING ORGANIZATION

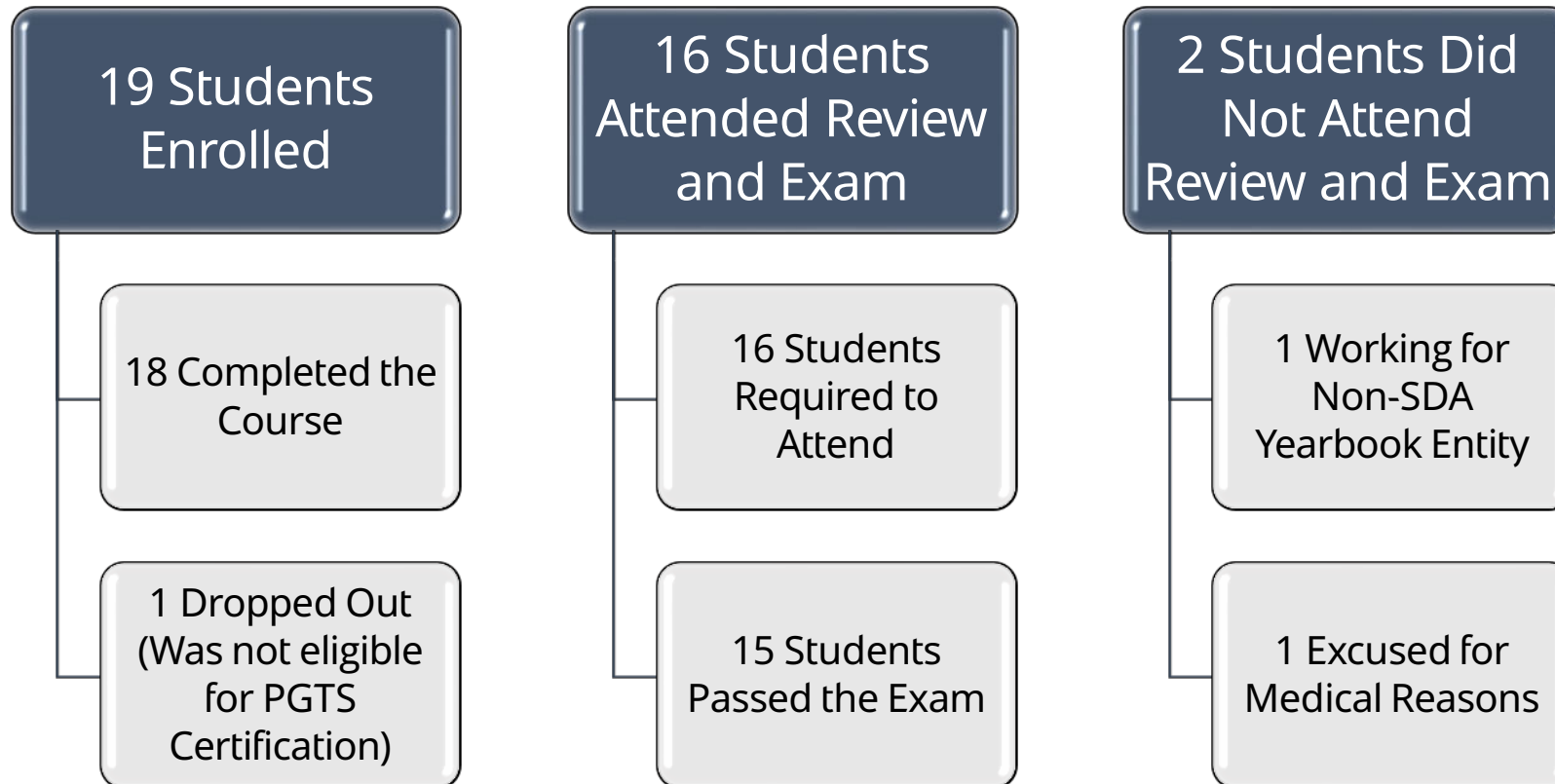
Information about becoming a Participating Organization for the Adventist Donor Gift Fund may be found here.

adventistlearningcommunity.com/adgftraining



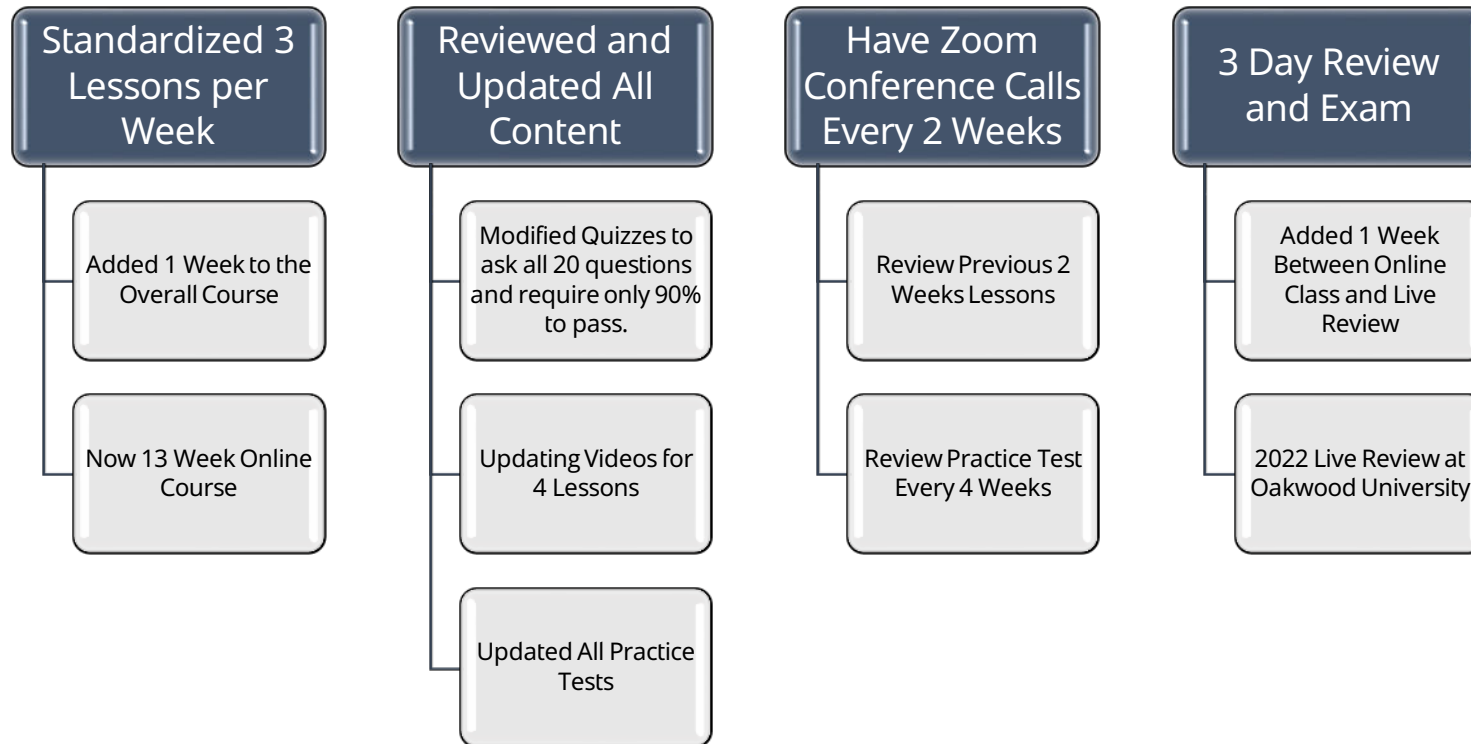
PGTS Certification Course

2022 Cohort



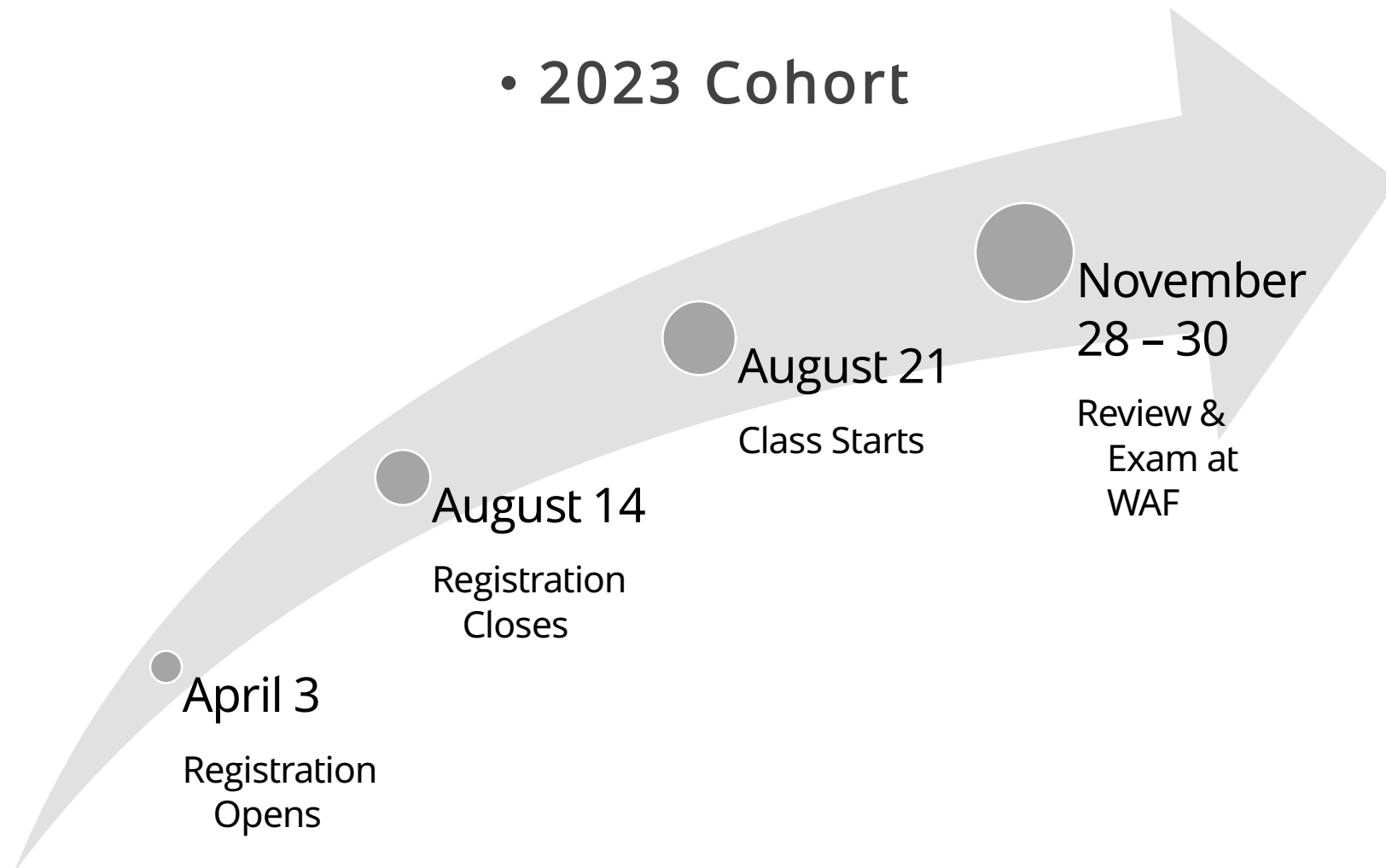
PGTS Certification Course

- 2022 Updates to Course



PGTS Certification Course

• 2023 Cohort



PGTS Certification Course

- 2023 Updates to Course

Review
and
Update
Content

Updated
4 Videos

Review
Various
Quizzes



CPE OFFERING FROM NAD

- **COURSES**

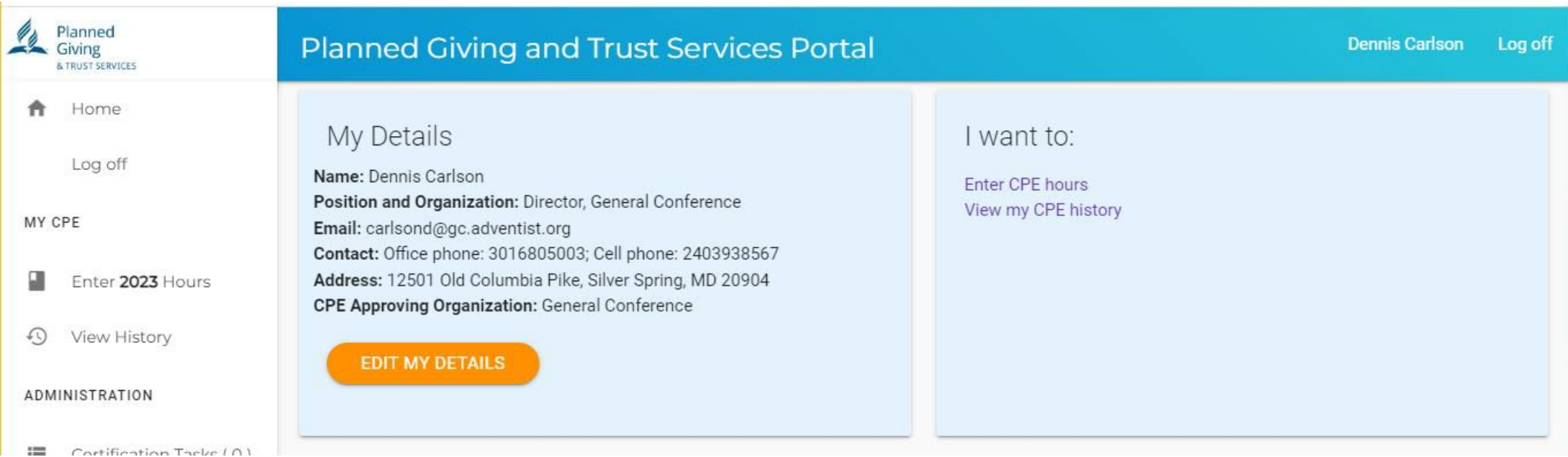
- Each course is made up of multiple asynchronous lessons, usually between 4 – 6 lessons, that may be completed whenever you please. Each lesson consists of reading material, a video presentation, PowerPoint slides, and a 10-question quiz. Many lessons also have a learning activity designed to help you apply the lesson to your PGTS program.

- **COST**

- Each CPE credit is \$10, e.g. a 4 CPE Credit course costs \$40, a 5 CPE Credit course costs \$50, etc.



PGTS PORTAL



The screenshot displays the PGTS Portal interface. At the top left is the logo for Planned Giving & Trust Services. The main header is a teal bar with the text "Planned Giving and Trust Services Portal" and the user's name "Dennis Carlson" with a "Log off" link. The left sidebar contains navigation options: Home, Log off, MY CPE (with sub-options for "Enter 2023 Hours" and "View History"), and ADMINISTRATION (with a sub-option for "Certification Tasks (0)"). The main content area is split into two panels. The left panel, titled "My Details", lists personal information for Dennis Carlson, including his position as Director of the General Conference, email address, contact numbers, address, and CPE approving organization. An orange "EDIT MY DETAILS" button is located at the bottom of this panel. The right panel, titled "I want to:", contains two links: "Enter CPE hours" and "View my CPE history".

Planned Giving & TRUST SERVICES

Planned Giving and Trust Services Portal

Dennis Carlson Log off

Home

Log off

MY CPE

Enter **2023** Hours

View History

ADMINISTRATION

Certification Tasks (0)

My Details

Name: Dennis Carlson
Position and Organization: Director, General Conference
Email: carlsond@gc.adventist.org
Contact: Office phone: 3016805003; Cell phone: 2403938567
Address: 12501 Old Columbia Pike, Silver Spring, MD 20904
CPE Approving Organization: General Conference

[EDIT MY DETAILS](#)

I want to:

[Enter CPE hours](#)

[View my CPE history](#)



PGTS PORTAL

CPE Reporting

- Reporting Deadline Moved to Dec 31
- Union Approval Deadline Jan 31
- Division Review and Approval Feb 1

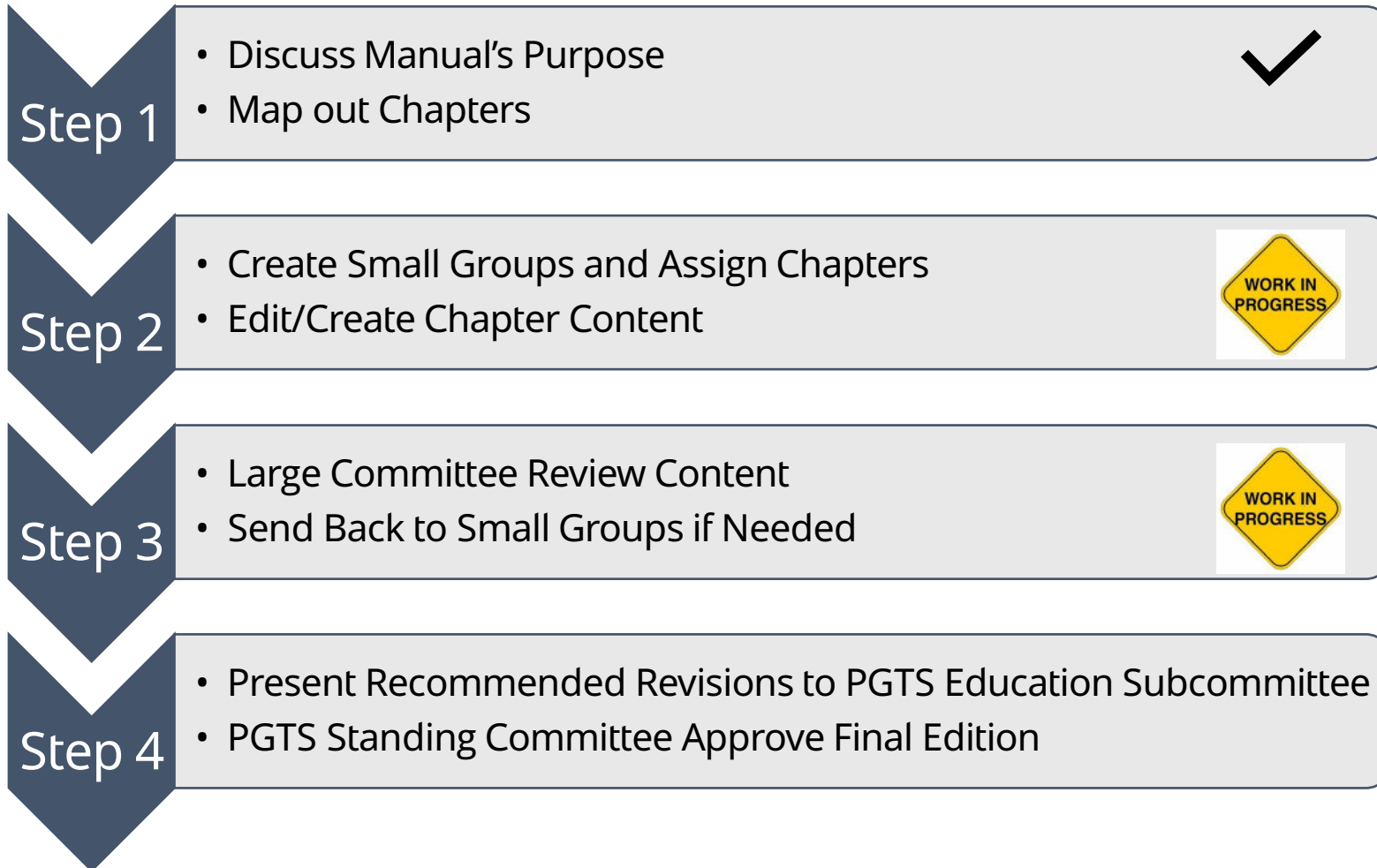
Portal Refresh

- Major Overhaul Starting in 3rd Quarter
- CPE Reporting and Approval Updated Stage 1
- Certification and Accreditation Updated Stages 2 & 3



PGTS Manual Revision

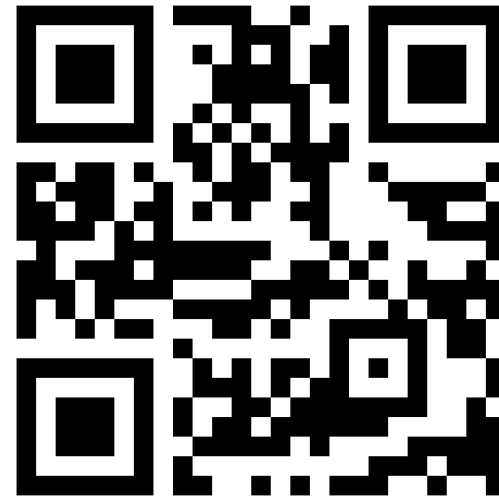
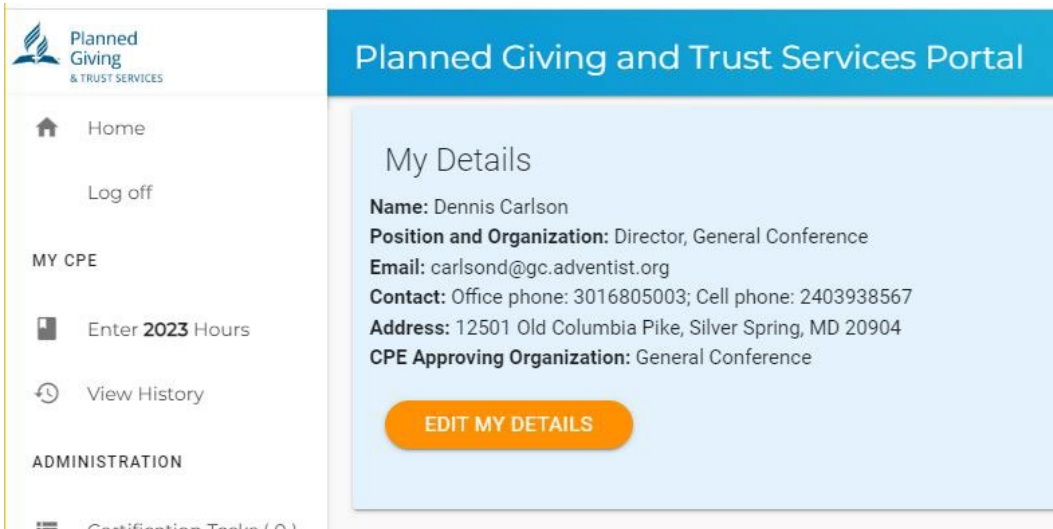
- Status Report



PGTS PORTAL

To Access the Portal

<https://portal.willplan.org/>





PGTS Manual Revision

27 Chapters

6 Appendixes

9 New Chapters

3 New
Appendixes

20 Chapters in
Various Stages
of Completion

7 Chapters and
all 6 Appendixes
Remaining



Revise the PGTS Code of Ethics

- Based on ACGP Model Standards
- Incorporated Previous PGTS Code of Ethics

Require Affirmation

- Incorporated into Certification Course
- Initial Certification Requirement
- Annual Reaffirmation through PGTS Portal



Code of Ethics



To Access the
Code of Ethics



PLANNED GIVING & TRUST SERVICES

Funding the Global Mission

REPORT 2020



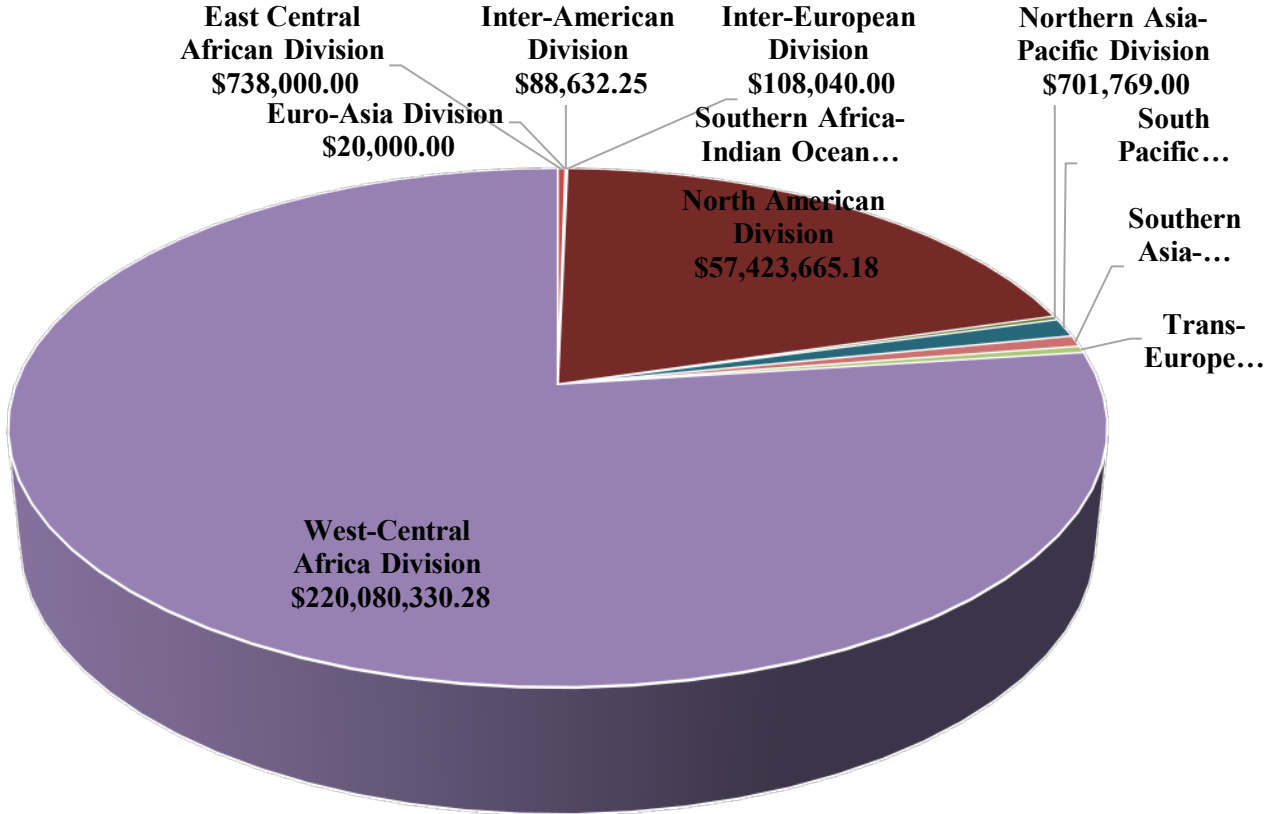
**Planned Giving & Trust Services
Mission Funding Report 2020**

All Divisions – \$ 285,610,180.02

| | |
|--|-----------------------|
| East Central African Division ECD | \$738,000.11 |
| Euro-Asia Division ESD | 20,000.00 |
| Inter-American Division IAD | 88,632.25 |
| Inter-European Division EUD | 108,040.00 |
| North American Division NAD | 57,423,665.18 |
| Northern Asia-Pacific Division NSD | 701,768.15 |
| South American Division SAD | 0 |
| South Pacific Division SPD | 3,265,133.00 |
| Southern Africa-Indian Ocean Division SID | 21,355.00 |
| Southern Asia Division SUD | 0 |
| Southern Asia-Pacific Division SSD | 1,975,638.69 |
| Trans-European Division TED | 1,187,617.36 |
| West-Central Africa Division WAD | 220,080,330.28 |



ALL REPORTING DIVISIONS
Mission Funding Report 2020



Global PGTS Annual Report 2022

Dennis Carlson



North America Division - Unions 2022 \$41,736,017.06

| | NAD | Maturities |
|---|---------------------|------------------------|
| 1 | General Conference | 655,238.01 |
| 2 | Atlantic Union | 631,932.47 |
| 3 | Columbia Union | 2,438,513.66 |
| 4 | Lake Union | 3,623,106.28 |
| 5 | Mid-America Union | 1,085,717.62 |
| 6 | North Pacific Union | 5,848,552.84 |
| 7 | Pacific Union | 15,123,663.04 |
| 8 | Southern Union | 6,746,099.48 |
| 9 | Southwestern Union | 5,583,193.66 |
| | Total | \$41,736,017.06 |



Planned Giving & Trust Services
Maturities Report 2022 for Ministries and Institutions
Total - \$14,332,134.39

| | INSTITUTIONS | Maturities |
|--|---------------------|-------------------------|
| | Ministries | \$ 835,466.00 |
| | Media | \$ 4,626,550.95 |
| | Healthcare | \$ 7,321,953.00 |
| | Higher Education | \$ 1,548,164.44 |
| | | |
| | | |
| | Total | \$ 14,332,134.39 |



ALL DIVISIONS – 2022

\$61,523,153.35

| | | |
|--|--|------------------------|
| | | |
| | East Central African Division ECD | 1,642,154.63 |
| | Inter-American Division IAD | 90,397.96 |
| | Inter-European Division EUD | 47,133.00 |
| | South Pacific Division SPD | 2,600,285.85 |
| | Southern Africa-Indian Ocean Division SID | 530,520.60 |
| | Southern Asia-Pacific Division SSD | 828,346.58 |
| | North American Division NAD | \$55,784,314.73 |
| | Total | \$61,523,153.35 |





Contributions to fund the mission of God through the
Seventh-day Adventist Church's Planned Giving & Trust
Services Ministry since 1968
= over \$2.4 Billion.



2025 Conference Location

Mid-America Union – August 4 – 7, 2025



2027 PGTS Conference

August 9 – 12
North Pacific Union





Willplan.us



Planned Giving

& TRUST SERVICES

