Our diocese would like to assist church leaders with developing the ability to promote and secure strong long-term giving relationships with your congregants. Our goal is to help you structure a team of local church members who have the expertise and perspectives to coordinate a system for planned giving in your congregation. Whether it is promoting a parish endowment or responding to inquiries from individuals contemplating their legacy wishes - this “A Team” can exist to provide a concerted effort (in sync with the annual work of the vestry) year-after-year in this specialized area.

Recruiting Now

We envision that a strong “A Team” would consist of some combination or all of the following:

- A church member with financial planning and tax expertise
- A church member with legal (estate planning) expertise
- A church member with a strong testimonial (those who have utilized planned giving themselves and are excited about it)
- *The current leader of congregation stewardship
- *The Rector/Vicar/Priest-In-Charge

This team is not elected, nor do they have prescribed terms or offices. They will be subject-matter-experts who are available to speak to the long-term, legacy efforts of the congregations. The realm of this team includes:

- promoting endowment giving and legacy societies (for those who have identified that they have named the church in their will/estate),
- assisting church members with the accounting and legal logistics of making a gift (wills, trusts, charitable remainder trusts, etc.)

Note this is not the same as an endowment fund board, a stewardship committee, a finance committee or any group authorized with the official fiduciary responsibility of the vestry. The “A Team” is a marketing and implementation team with a high level of financial and legal expertise. They will work as auxiliary support to the vestry and stewardship committee which may change on an annual basis. Above all, the “A Team” is a group who cares about the long-term legacy of your congregation.
At this Upcoming “A Team” Event

At this, our first in a series of networking events, we’ll hear brief comments from:

- Special Guest: Ken Quigley - Director of Endowment Management Services, Episcopal Church Foundation
- Members from a few existing “A Teams” in Southwest Florida

Enjoy introductions and conversations with fellow champions for endowments and planned giving

Receive a Planned Giving Toolbox offered through the Episcopal Church Foundation

Identify your Recruits

Identify 3-4 individuals that are appropriate for your church Planned Giving “A Team” and then forward the following information:

- Name
- Email and Phone
- Area of Expertise or Perspective (financial, tax, legal, testimonial, stewardship)

To Anne Vickers, Diocesan CFO at avickers@episcopalswfl.org.

These events will be invitation-only and after business hours. They will focus on identifying expertise and needs, and making connections between individuals and resources. These events are not boring workshops or webinars, on the contrary we are looking to harness the expertise and energy of the individuals within our churches - to support them in serving your congregation.