

Easy Steps to Joyous Giving - **Legacy Giving in the Church**

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Marketing & Development Committee of CCIW

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1. Welcome & prayer – Mike Dixon
2. Introductions of our presenters – Scott Woolridge
3. An overview of the giving pyramid – Scott – gifts from checkbook, savings/investments, bequests
4. Introduction to legacy giving with a couple specific questions to get a feeling of their subject knowledge – legacy knowledge & experience - Don
5. Discussion questions - What is legacy giving? and What legacy giving is not? - Don
6. Sharing the Canton Y's endowment plan and formula + gatherings – Don
7. Talk about the 3 lap concept – lap 1 - wills & insurance, lap 2 – annuities & trusts, lap 3 – income instruments – pooled income, joint investments - Don
8. Sharing of stories in Illinois & Wisconsin churches – Scott will facilitate
9. The story of First Christian Church and how you might duplicate it - Darwin
10. Best practices for a fruitful legacy ministry
11. Christian Church Foundation as your partner
12. Questions/discussion – more info? Clarify? What would help you most?
13. Closing thoughts and closing prayer

