

Diocese of Milwaukee and Trustees of Funds and Endowments Present
Workshop on Planned Giving for Parish Leaders
Saturday – September 26, 2015 – 10:00 am – 12:00 pm

At St. Mary's Episcopal Church
36014 Sunset Drive (Hwy. 18 & 67)
Dousman, WI 53118

Both parishes with an existing Planned Giving ministry and/or an Endowment, as well as those without one, will benefit from this workshop. This workshop reviews best practices and empowers leadership to be able to take the best, next steps for their congregation!

Basics of Planned Giving for Your Congregation

Take the mystery out of planned giving for your congregation. Learn in easy to understand terms how planned giving differs from annual stewardship and capital campaigns, and how your congregation can build endowments through wills, life income and other planned gifts. Along with a review of the planned giving instruments, you will learn about the importance of a parish vision, protecting and growing your endowment, and how to invite others to remember your parish through estate and financial planning. Participants will also learn how endowments can be used to enhance your ministries and overall mission. You will leave the workshop with a plan of action!

To register for the September workshop, please contact Michael Hagon via e-mail at MHagonTFE@wi.rr.com , or phone at (414) 232-7358 by Monday, August 31, 2015. There is no charge for the workshop.

**Workshop
leader:**

Jim Murphy is Managing Program Director of Financial Resources at the Episcopal Church Foundation (ECF). He oversees ECF's financial development programs and resources, including planned giving and endowment management. He leads workshops and works with congregations, dioceses, and other Episcopal organizations to enhance and develop their programs and resources.

Prior to joining ECF in 2008, Jim was Director of the Master of Arts Program and Program Manager for Lifelong Learning & the Center for Christian Spirituality at the General Theological Seminary. For more than 16 years he worked for a major international law firm in NYC, serving in a number of financial management roles. He has been an active volunteer leader in stewardship, parish administration, and Christian formation ministries in several Episcopal parishes in New York and New Jersey.

A native of Lansing, MI, Jim holds a Certificate in Fundraising from New York University's School of Continuing and Professional Studies, an MA in Christian Spirituality from the General Theological Seminary, and a BS from NYU's Stern School of Business. Jim is a member of the Association of Fundraising Professionals (AFP) and is a Certified Fund Raising Executive (CFRE).