

Eden United Church of Christ  
and the  
Eden Area Foundation

Planned Giving Ministry

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**Introduction**

In June 2011, a joint committee representing Eden United Church of Christ (Eden UCC) and the Eden Area Foundation (the EAF) was formed to explore the development of a Planned Giving program to provide individuals associated with the Eden UCC and the EAF the opportunity to make planned gifts, according to their personal preference, to either or both organizations and to ensure that both organizations were prepared to receive, process, invest, and/or spend those gifts in an appropriate, legal, and Christian fashion. The Planned Giving Ministry outlined in the document describes and defines a ministry to individuals intended to assist them in the implementation of their call to Christian stewardship of their financial assets. This document also provides a detailed description of how both organizations will steward the resources provided through planned gifts.

**Theological Basis for Planned Giving**

The encouragement of individual giving and the stewardship of that resource both begin when individuals and organizations embrace the belief that God is the source of all that we have. As Psalm 24:1 says, “The earth is the Lord’s and all that is in it, the world, and those who live in it...” What we own and treasure is not ours alone, but ours by a gift of God. Not only is important to acknowledge that we are the beneficiaries of God’s generosity but that we also are the recipients of the hard work and generosity of those who came before us. As Joshua 24:13 say, “I gave you a land on which you had not labored, and towns that you had not built, and you live in them; you eat the fruit of vineyards and olive groves that you did not plant.” The natural and Christian response to embracing the concept that our lives are gifted is to respond by giving

to meet the needs of others, not only because it is mandated by God in both the Old and New Testaments, but because as a sign and symbol of our gratitude for what we have received.

Regarding what we should give and to whom, Jesus and early Apostles taught that giving should be the result of prayer, good intentions, and dependent on the ability of the person and the needs of the church. As it says, in 2 Corinthians 9:7, each person should give what is in his or her heart to give, not reluctantly or under compulsion, for God loves a cheerful giver. More specifically, in 1 Timothy 6:18-19, individuals with resources are advised “to do good, to be rich in good works, generous, and ready to share, thus storing up for themselves the treasure of a good foundation for the future, so that they may take hold of the life that really is life.” Each of us fulfills our call to Christian giving, stewardship, and life in our own unique manner, often within our life time by the gift of our talents, time, and treasure. For many, a gift after death allows them to continue what has become a life-long habit of expressing Christian love and compassion through their financial gifts. By creating and implementing a Planned Giving Ministry, Eden UCC and the EAF are providing an opportunity for those individuals who choose to make planned gifts to do so in a simple and straightforward manner.

### **Planned Giving Committee**

To facilitate administration of the program and to advise the Council and the EAF Board, a Planned Giving Committee was created. According to the Eden UCC Bylaws, the Planned Giving Committee shall consist of four to six active members of the church, of which at least two and no more than three shall be appointed by the Church Council, and of which at least two and no more than three shall be appointed by the EAF Board of Directors. This committee shall develop and maintain a program of stewardship that invites and coordinates financial contributions from members and friends for the long-term financial health and future ministry of Eden UCC and/or the EAF, through gifts to the church’s reserve fund accounts and/or to the corpus of the EAF. Any planned giving policies that may be drafted by this committee which pertain to gifts sought by the church require preapproval of the Church Council, and any planned giving policies which pertain to gifts sought by the foundation require preapproval of the Eden Area Foundation Board of Directors. The Planned Giving Committee will meet regularly and as needed to administer the Planned Giving Ministry and promote planned giving through activities such as brochures, website development, letters, seminars, and personal contact.

## **Types of Planned Gifts Accepted**

The Planned Giving Ministry accepts bequests of cash and cash equivalents by will or trust and by beneficiaries designation (such as from IRA, 401(k), annuities, life insurance, pay on death account, and transfer on death account). Gifts under a will or trust of non-cash are accepted if the executor or trustee is directed to sell the asset and distribute the sales proceeds. But direct gifts of non-cash gifts such as automobiles, real estate, art work, and other tangible assets can only be accepted with the prior approval of the Eden UCC Council and/or the EAF Board.

## **Purposes and Uses of Planned Gifts**

Planned givers to Eden UCC and the EAF have many options for designating the use of their gifts. Donors may choose one or more of the following purposes to receive funding:

- **Eden Area Foundation:** gifts to the EAF will be invested with the EAF's current endowment fund in accordance with the current by-laws:
  - to support Christian outreach programs for the welfare of the local community and
  - to exercise such stewardship in ways that promote Christian principles, demonstrate Christian compassion in the community, and enliven Eden Church itself.
- **Eden UCC Purposes:** Within the category of Eden UCC Purposes, planned givers may choose one or more of the following options:
  - **Building Fund:** a fund for construction, improvement, and repair of the Eden UCC's buildings and physical plant (excluding the organ), including planning, design, construction, and construction management costs. For example, funds would be used for new roofs, windows, doors, and other major repairs and replacements.
  - **Organ Fund:** a fund for the repair and maintenance of the Eden UCC's organ
  - **Pledges and Gifts Fund:** an unrestricted fund to support Eden UCC ministries and programs such as Christian education, music, spiritual life, and community outreach programs such as Spirit-in-Action or Compañeros Ministry.
  - **Greatest Need Fund:** an unrestricted fund to be used as Eden UCC Council determines would best address the church's greatest need at the time the gift is received.

## **Process for the Receipt of Planned Gifts**

Eden UCC and the EAF will maintain their own process for the receipt and use of Planned Gifts. The Eden UCC process will be specified in the Eden UCC Financial Policies,

which are available at [www.edenucc.com/leadership](http://www.edenucc.com/leadership).<sup>1</sup> The EAF process will be in accordance with the Eden UCC Financial Policies<sup>2</sup> and the EAF Statement of Investment Policy, which is available at [www.edenareafoundation.org](http://www.edenareafoundation.org).<sup>3</sup>

### **Investment of Eden Area Foundation Funds**

Planned gifts to the EAF will be invested in accordance with the EAF Bylaws and the EAF Statement of Investment Policy, which can be found at [www.edenareafoundation.org](http://www.edenareafoundation.org).<sup>4</sup>

### **Promotion of Planned Giving**

Over the course of each year, the Planned Giving Committee will inform and motivate the congregation and others about planned giving to the Eden UCC and the EAF. Components of their efforts may include:

- The development of a brochure summarizing the Planned Giving Ministry, including the specific purposes described above.
- The addition of Planned Giving Ministry information to the website of Eden UCC and the EAF.
- A semi-annual or annual letter on selected planned giving topics to selected members of the congregation, which will include a specific request and language for the inclusion of Eden UCC and/or the EAF in a member's will or estate.
- An annual workshop on planned giving with an emphasis on preparation of wills and living trusts. The workshop may include expert legal information or assistance in the preparation of wills, living trusts, beneficiary forms, durable power of attorney, and other legal issues of interest and assistance to potential planned givers.
- Individuals requesting additional information in response to the Planned Giving Ministry's brochures, letters, and workshops will be contacted by members of the Planned Giving Committee. All personal contact will be confidential and in complete accordance with Eden UCC's Safe Congregation Policies, which are available at [www.edenucc.com/leadership](http://www.edenucc.com/leadership).

### **Recognition of Planned Givers**

Eden UCC and EAF would like to publicly acknowledge and thank planned givers who have included Eden UCC and/or EAF in their estate plans. Planned givers may be acknowledged, with their permission, in the Planned Giving Ministry's informational materials, including the brochure, the website of both organizations, and/or in the Annual Report of Eden UCC.

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<sup>1</sup> Eden UCC Financial Policies will need to be amended with Planned Giving procedures.

<sup>2</sup> Adopted by the EAF Board by MOU with Eden UCC on April 28, 2011.

<sup>3</sup> To be posted on the EAF's new website.

<sup>4</sup> To be posted on the EAF's new website.

## **Conclusion**

The development of a Planned Giving Ministry, supported by an ongoing Planned Giving Committee, with an annual program of promotion, is an important first step in providing Eden UCC members and the EAF supporters with simple and easy means to express their faith, their gratitude to God, and their love for both their church and their community.

### Adopted

Eden Area Foundation, Board of Directors, 1/ 26/2012  
Eden United Church of Christ, Church Council, 2/7/2012