


Welcome! This webinar will begin shortly...

Money Talk: Questions Your Congregation Asks When You're Not in the Room

Thursday, November 16, 2017
12 pm ET / 11 am CT / 10 am MT / 9 am PT


Presenters: James Bakke and Amy Bakker Baty
Host: Scott Thunder




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WELCOME AND INTRODUCTIONS



Scott Thunder
Webinar Host



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QUESTIONS?

Email webinar@BarnabasFoundation.com



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Today's Presenters



James Bakke
Executive Director



Amy Bakker Baty
Director of Planned Giving



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Today's Topics

- What happens in a Barnabas Foundation planning meeting?
- What are the most common concerns that affect church giving?
- What are believers saying – and how should you respond?



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WHAT HAPPENS IN A BARNABAS FOUNDATION PLANNING MEETING?



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Motivation to Meet with Barnabas Foundation Planner


- Get the "house in order"
- Tax-wise planning and giving
- Heart for building God's kingdom
- Responsible transfer of wealth
- Build a legacy



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Atmosphere of Confidence and Trust

- Conversations about more than just money
- Deep dive into private family situations and challenges



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Common Characteristics of Our Clients

- Faith-driven
- Generous at heart
- Business-minded and financially savvy
- Love you and your church
- View you as their spiritual shepherd



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Typical Estate Gifts from Our Clients

- Leave an amount or percentage to organizations close to their heart
- How much goes to the church?
 - Some leave most or all to the church
 - Some restrict their gift for a specific purpose
 - Some leave a very small "memorial gift"
 - Some don't want to leave anything



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COMMON CONCERNS ABOUT GIFTS TO A CHURCH



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Three Concerns that Affect Church Gifts

- What is my church's vision for ministry?
- Do my church leaders have the financial knowledge to steward my gifts well?
- How can I leave a lasting legacy?



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VISION FOR MINISTRY



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Vision for Ministry


“We can't ask our people to give any more than they are giving now.”



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Vision for Ministry


“The only time our pastor talks about money is when we’re behind on budget.”



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Vision for Ministry

“When the church’s vision is large enough to match mine, then I’ll do all my giving to the church.”



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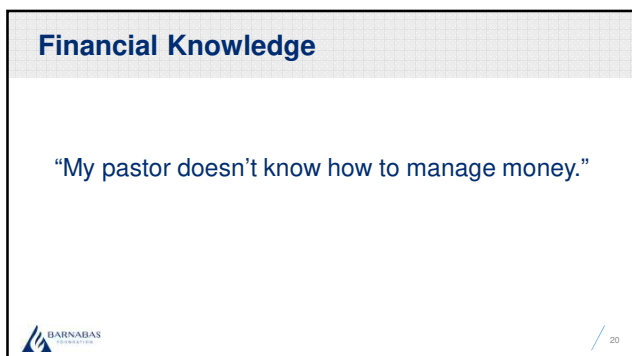
Vision for Ministry

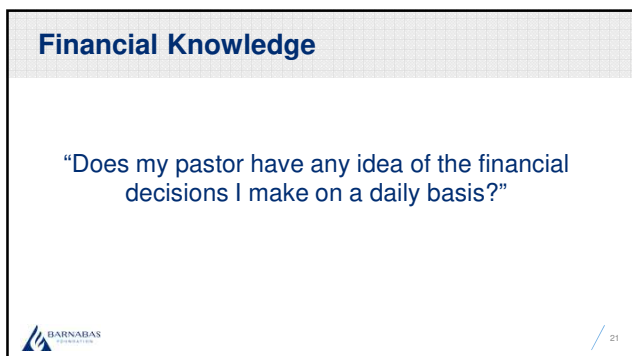
- The larger your vision, the more money is available.
- Illustrate impact through stories
- Encourage people to invest in ministry, even outside the church.
- Givers respond to opportunity and potential impact, not financial crises.



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Financial Knowledge


“The last time our church received a large gift, they didn’t know what to do with it.”



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Financial Knowledge


“Sometimes it seems like my pastor thinks making money is a bad thing.”



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Financial Knowledge

- Learn to manage your personal finances better.
- Recognize and accept financial wisdom from godly business people in your congregation.
- Inquire about the business and financial challenges your people face.



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DESIRE TO LEAVE A LEGACY



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Desire to Leave a Legacy


“Will my church even be around to use my gift in 10 to 20 years?”



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Desire to Leave a Legacy


“Will a gift in my will discourage weekly giving from other people in the church?”



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Desire to Leave a Legacy


“How will the church use my gift? Will it be helpful or harmful for the church?”



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Desire to Leave a Legacy

“Could I designate my gift for a particular project or ministry?”



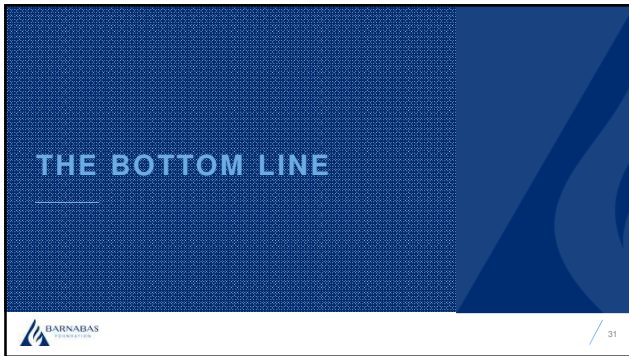
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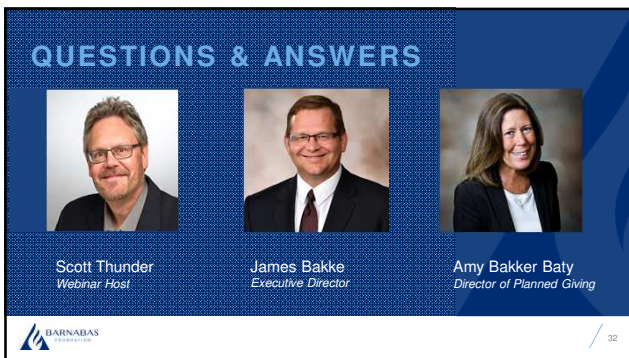
Desire to Leave a Legacy

- Communicate opportunities that could be funded with large gifts.
- Set up a foundation to facilitate estate gifts.
- Manage large gifts well to reduce controversy and frustration.



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New Church Communications Director



Rev. Phillip Leo
pleo@BarnabasFoundation.com



New Tool for Your Congregation

- Simple way to introduce individuals and families to Barnabas Foundation
- Particularly beneficial for families interested in estate gifts or complex gifts that require professional assistance
- Complimentary copies available to all U.S. CRC churches, in limited quantities
- Email pleo@BarnabasFoundation.com to order



Watch Your Email

- Feedback
- PowerPoint Slides
- Next Church Webinar will be Thursday, February 1

