



## Planned Giving Program Agreement 2023

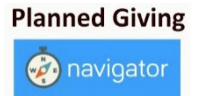
Church/Organization Name \_\_\_\_\_

Contact Person Assigned(title/first/last) \_\_\_\_\_  
(see Navigator job description, page 3)

Contact Person’s Email \_\_\_\_\_

Contact Person’s Phone \_\_\_\_\_

Planned Giving Navigator brings personal guidance from experts to provide the tools and service your church or organization needs to:



- Create a calendar with recommendations, action items and educational segments.
- Create personalized brochures that you and your staff can edit.
- Set up a planned giving web page with a seamless click from your existing website.
- Provide a central file system in the cloud for all committee members to access.
- Add customized videos with donor stories and welcoming messages to your website.

### The United Methodist Foundation of Louisiana agrees to:

- Pay 50% of your church or organization’s subscription cost to Planned Giving Navigator, an online tool used for marketing material, task calendar, website and storage. (Full cost is \$500 per church; with Foundation sponsorship, cost is only \$250. This is a one-time fee per church or organization.)
- Coordinate in-person and web-based group training sessions and discussions between participants and Planned Giving Navigator.
- Provide tech support through Planned Giving Navigator.
- Refund your church or organization’s \$250 at the end of one year, if commitments outlined below are met and the church found the program to be unsatisfactory.
- **Reinvest** the cost to another year’s subscription at the end of one year, if the church or organization chooses to continue.
- If the church or organization has not met the requirements outlined below, there will be no refund.

## Planned Giving Program Agreement 2023

\_\_\_\_\_ (church or organization name) agrees to:

- Appoint a contact person from your church or organization, (contact person job description is outlined below) either volunteer or paid staff, who will attend the group sessions, learn to use the Planned Giving Navigator online portal, and oversee the church or organization's planned giving program. (Enter contact name and info above.)
- Use the program for one year, and
  - Attend at least 75% of all group meetings
  - Populate the software with your church or organization's information
  - Use at least the calendar, brochure and web page resources provided
- Invest \$250.00, to be mailed to the Foundation with this signed commitment (make checks payable to United Methodist Foundation of Louisiana), which will be returned at the end of one year if commitments mentioned above are met and Navigator was considered unsatisfactory, or reinvested to continue for another year, if desired.

### Signed:

\_\_\_\_\_  
Chris Spencer, President, United Methodist Foundation of Louisiana  
Date \_\_\_\_\_

\_\_\_\_\_  
Pastor of \_\_\_\_\_ UMC, City/State \_\_\_\_\_  
Or Director of \_\_\_\_\_ City/State \_\_\_\_\_  
Date \_\_\_\_\_



## **Job Description**

### **Planned Giving Navigator Contact Person**

**Purpose:** to lead the educational effort in the church to raise the congregation's awareness of planned giving.

**Duties include:**

- Schedule and oversee committee meetings.
- Set goals for the use of the online program "Planned Giving Navigator"
- Agree to the commitments outlined in the Planned Giving Program Agreement with the United Methodist Foundation of Louisiana.

**Recommended skills and characteristics:**

- Well-respected within the congregation
- Understands the connection between faith and money, ie: is a giver
- General computer skills and access to a computer
- Good organization and communication skills
- Ability to facilitate committee meetings
- Ability to learn Planned Giving Navigator online program.
- Have some basic knowledge or willing to learn about planned giving

As a matter of integrity, the pastor, the chair and committee members should be expected to make a planned gift to benefit the church, such as:

- a bequest in your will
- a beneficiary designation on an insurance policy or IRA
- a charitable gift annuity
- a charitable trust, or
- a life estate gift (gift of real estate)