

# Planning throughout the Year

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## Presenters



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## Q&A Instructions

At any time in the presentation submit your questions via the Q&A tab on your Zoom menu.



## Prayer

Almighty God, whose loving hand hath given us all that we possess: Grant us grace that we may honor thee with our substance, and, remembering the account which we must one day give, may be faithful stewards of thy bounty, through Jesus Christ our Lord. Amen.



# Agenda

The importance of planning

“Last Things” Essential To Do List

What is the role of the church?

How to have conversations about planning for end of life

Using the liturgical calendar to help plan

Is your church prepared?

Best practices

Q & A



## The Importance of Planning

- *“As death appears to be inevitable, perhaps we should consider it now.”* (His Holiness the Dalai Lama)
- Eases the spiritual, emotional, and financial repercussions of one’s death.
- Helps you align your beliefs about God and your values with your end-of-life choices.
- Ensures you have taken the time to document your wishes and that these will be carried out.



# “Last Things” Essential To Do List

- Make a will (and remember the Church!)
- Make out a State of Colorado Living Will Declaration.
  - Have it witnessed.
  - Form available online.
- Make out a State of Colorado Health Care Power of Attorney Declaration.
  - Have it witnessed.
  - Form available online.
- Fill out a Burial Instruction Form.
  - Available from the church on paper or in a Word document) – or similar forms made available by other churches, Forward Movement, and other organizations.
- Place documents in a safe, visible place among your household records where they can be easily found upon your death.
  - Make copies of this document for others, as appropriate.



## Suggested Resource

*Planning for the End of Life: Faithful Stewards of Your Good Gifts*

- Advance medical directive
  - Check state requirements
- Proxy form
- Planning your funeral service
- Preparing to write your will
- Episcopal Church Foundation (ECF) resource, downloadable at <https://www.episcopalchurch.org/programs/planned-giving/planned-giving-brochures#PGBrochure>



# Why Should Churches Be Involved in End-of-Life Planning?

- Death is a powerful experience for each and every person.
  - Churches care about spiritual health and wellbeing of people.
- End-of-life planning involves both head and heart, prayerful discernment and action.
- Churches provide safe, loving space to have difficult conversations.
- Churches play important role at the time of death and after.
- Churches often serve as stewards of our final financial wishes tied to our core beliefs and values.



## How to Have Conversations about Planning

- Invite presentations by area experts: how to write a will, completing an advance medical directive
- Offer series on planning for end-of-life. Do the work together.
- Engage in book discussion (*Falling Upward, The Gift of Years*)--encourage planning while exploring the gifts of the second half of life.

*Invite family members to participate!*



# Planning throughout the Church Year

## Epiphany

- One of two green, growing seasons of the year
- A time for remembering gifts
- Reminder of the inevitability of death even at birth
  - Gift of myrrh—ointment used in burial
- Typically the time of annual meetings

A time for: Church endowment and legacy giving policy and best practices review; creating a wish list; giving thanks for gifts given during course of year; present at annual meeting



# Planning throughout the Church Year

## Lent

- Reflections on mortality: *Remember that you are dust, and to dust you shall return.*
- Time for self-examination and prayer and taking on a spiritual discipline
- Season of preparation for Christ's death and resurrection

A time for: Helping people understand why planning for death is important to having a good death; encouraging planning as a spiritual discipline; family conversations; Lenten series on second half of life and/or planning together; reviewing "red box"



# Planning throughout the Church Year

## Easter

- Resurrection and new life
- Celebration
- Preparation for the coming of the Holy Spirit (Pentecost)

A time for: Thinking about what we want to leave as our legacy; encouraging end-of-life gifts and gifts to the endowment; celebrating legacy society members; sending ongoing thank yous; updating communications list



# Planning throughout the Church Year

## Ordinary Time

- Long green, growing season
- Living out our ministry
- Close of liturgical year
- All Souls celebration

A time for: Setting up an endowment fund; creating a legacy society; planting legacy garden, trees; Highlighting what church teaches/believes about death; Remembering those who have gone before; reminding people that they leave a legacy for those who come after; providing a planning guide and helping parishioners plan for Christian burial



# Is Your Church Prepared?

- For a large gift
- For any gift
- Supporting families
  - Pastoral conversations
  - Special circumstances
  - Family conflict
  - Congregational support
  - Suggestions for possible memorial gifts



## Best Practices

- Build trust, be transparent, be inclusive, say thank you
- Documentation (endowment fund, legacy society)
- Record keeping and archives
- Acceptance policy (types of gifts)
  - Mechanism for processing these gifts
- Endowment committee
- Legacy society committee or point person
- Campus committee/standards/wish list





# Q & A



## Additional Resources

Visit the Legacy and Planned Giving page on the Episcopal Church in Colorado website:

<https://episcopalcolorado.org/congregational-resources/development-stewardship/legacy-and-planned-giving/>



# Additional Webinars in this Series

- February 5 – Doing Planned Giving Well (noon to 12:45 pm)
- January 22 webinar recording – Why Preplan?
- Register and view recording at <https://episcopalcolorado.org/congregational-resources/development-stewardship/legacy-and-planned-giving/>



This completes our webinar.

**Thanks for Joining!**

