



PARISH PLANNED GIVING

An Offering of the



GREEK ORTHODOX
ARCHDIOCESE OF AMERICA

Atlanta Metropolis Clergy-Laity Assembly

Workshop

6.13.25

*“You will be enriched in every way so that
you can be generous on every occasion,
and through us your generosity will result
in thanksgiving to God.*

2 Corinthians 9:11



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*Why do so many churches and nonprofits
have endowments?*



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Lessons Learned



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Vision

Set clear priorities
and directives for
giving

Leadership

Diverse talent and
succession
planning

Plan

Lay the right
foundation at the
beginning

Fit

Be true to your
parish in
execution

What are the guidelines for creating and maintaining a church endowment?



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Establish
Set Vision
& Governance



Advance
Raise Awareness
& Funds



Flourish
Grow Gifts &
Grants

Guidebooks • Templates • Videos • Coaching

“You will be enriched in every way by your great generosity.” II Corinthians 9:11



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Establish

Set Vision
& Governance

Founding Documents/Bylaws
Investment Policy
Giving Guidelines & Priorities
Gift Acceptance Policy
Recognition Policy
Donor Forms



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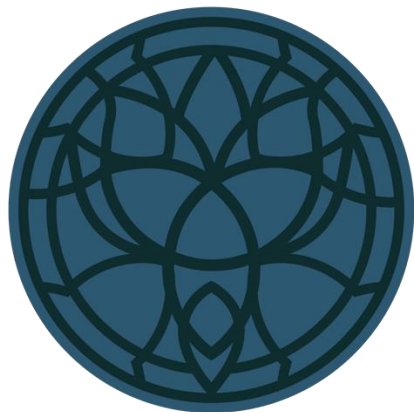
HOW it aligns . . .

Resource Allocation & Vision Alignment



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How our giving aligns . . .



Annual Stewardship

*First fruits from our
gifts of income*



Major Gifts

*Time-bound offering
to address specific needs*



Planned Giving

*One time offering of
the first fruits of our
wealth or gain*



*Together, we
fulfill our call
as Orthodox Christian
Stewards*

Annual Budget
*Supports the operations
of the parish*

Capital & Special Projects
*Funds facilities and
program improvements*

Endowment
*Provides for the long-
term security of the
parish while giving
back to the community*



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An Offering of the

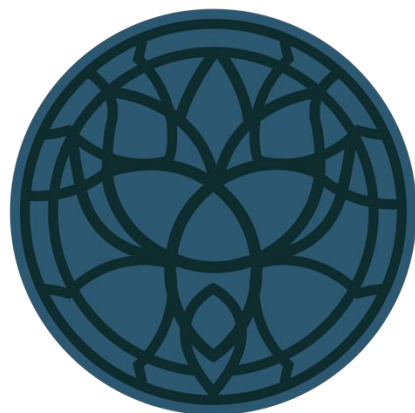


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Donors who have remembered an organization with a planned gift will **donate more than 2x the amount annually** than a donor who has not made a planned gift to the organization.

- Lily School of Philanthropy

A Comprehensive Campaign Example



Annual Stewardship
*10% increase for
campaign duration*



Capital & Special Projects
*Major Gift to Support
Campaign Capital Goals*



Endowment
*Planned Gift to the
Endowment*

One Invitation, Lasting Impact





Advance

Raise Awareness
& Funds

Education
Operational Model
Documentation
Earning & Giving
Expertise
Financial, Legal, Tax



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Revenue Stream Potential +/-



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*Opportunity
for Many*

*Reliance on
Few*

Capital/Planned
Gifts

Stewardship

Festivals

Rental Revenue

Endowment



St. Mary's Minneapolis, MN



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Visionary
donors
1978

Formalized
early
1990's

\$800,000
gifted to
the
endowment

\$600,000
offered in
grants

\$3,100,000
current
value
\$150K/yr

Compounding & Clarifying

*Who decides how and when distributions
are made?*



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Three Channels

St. Mary's ~ Minneapolis

- Seed Funding
for new parish programs
- Seed Funding
for new philanthropic initiatives
- Fr. Anthony
Spiritual Enrichment Fund

Endowment
Planned Giving
Extraordinary
Parish Programs
& Philanthropy

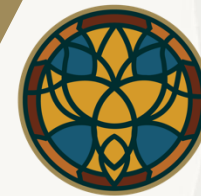
**Annual
Budget
Stewardship**
Annual
Operating
Expenses –
including
Philanthropy



Capital Reserves
Rental Income & Gifts
Building and
Renovation Projects

- Building and campus
maintenance
 - Staff salaries and benefits
 - Program budgets
 - Annual Philanthropy –
Philoptochos; Mission &
Outreach; Archdiocese
- *Includes annual events like
the festival*

- Improvements
& expansion to
campus facilities –
rental properties and
parish house



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Music Ministry ~ *Chant Class*



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What are other endowments funding?



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Philanthropy

From international
to local
extraordinary need

Scholarships

For local to global
camps &
education

Iconography

Enhancing
structures &
teaching the faith

Missions

Sharing faith
with missionary
outreach

Three Channels

Your Parish

- *Extraordinary Opportunities*

**Annual
Budget
Stewardship
Operating
Expenses –
including
Philanthropy***

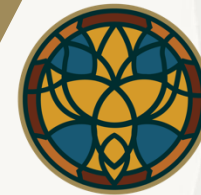
- *Building and campus maintenance*
- *Staff salaries and benefits*
- *Program budgets*
- *Annual Philanthropy**



**Endowment
Planned Giving
Extraordinary
Outreach &
Evangelism**

**Capital Reserves
Rental & Other Income
Building and
Special Projects**

- *Facility Enhancements & Special Projects*



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Communication & Invitation

Opportunities & Outreach



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Flourish
Grow Gifts &
Grants

Promotion
Events & Materials
Invitation
Identification & Training
Growth
Threshold Planning



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*“Not that I seek the gift, but I seek the fruit
that abounds to your account.”*

Philemon 4:17

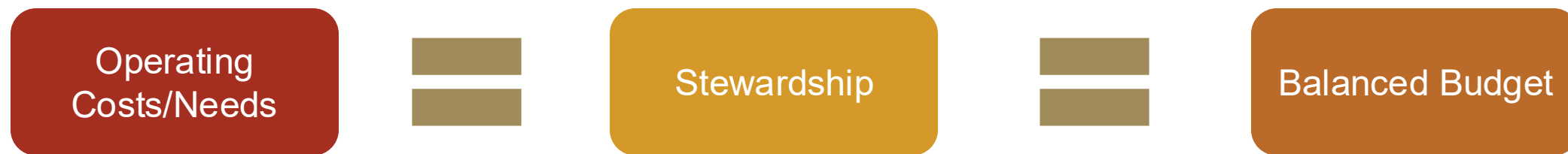


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Ministry-Centric Model



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What's the message?

From a personal perspective?
From a parish perspective?

Soul-Centric Model



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Gift of First Fruits



Sacrificial Giving
to God to
Transform



Step on the Path
to Salvation

What's the message?

From a personal perspective?
From a parish perspective?

Sample Brochure Components



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Our Mission

St. Symeon's Endowment was established in 2000 to provide for the long-term security of the parish while having a direct impact on our youth, our ministries, and our philanthropic outreach.

Your Opportunity

Planned Giving

Consider extending your support of our parish for generations to come through a thoughtful gift from your estate.

DirectSupport

Gifts of cash or appreciated assets help to seed the endowment, amplifying the impact of our giving.

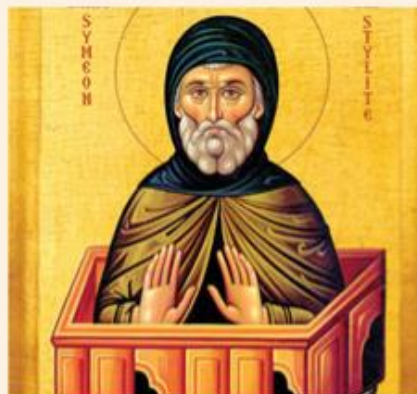


Join us -
Support tomorrow's
generation, today.

Contact an Endowment Board
Member to learn more.

•
•
•

endowment@stsymeon.org
www.stsymeon.org/endowment



ST. SYMEON'S
PARISH ENDOWMENT

Faith
In Our
Future

GIVING TO GROW

Sample Brochure



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*"St Symeon has been
our parish home for
over 40 years.
Including the
Endowment in our
estate allows us to
continue our
connection for
generations to come."*

Faith & Michael
Contos

Ways to Give

Bequest
Beneficiary Designation ~
IRA/Insurance
Gifts of Property
Annuities & Charitable Trusts
Donor Advised Funds
Appreciated Assets
Qualified Charitable
Distributions



"Our expansion project would not have been possible without our grant from the St. Symeon's Endowment. We can reach more people and provide more resources than ever before ~ thanks to your generosity." Trinity Food Shelf Director



**Sam
Pappas**
IV Scholarship
Recipient

"My IV experience rooted me in my faith and ensured that I would stay connected to my church and my culture wherever I go. I'm grateful for the opportunity this grant made possible."

Our Endowment's Impact

2024 Grants

Youth Programming ~
4 Scholarships to Ionian Village

Facility Enhancement
2 New Icons in the Chapel

Philanthropy
Emergency support to
IOCC
Trinity Food Shelf
Expansion

Ministry Development
Seed grant for music
director

**\$50,000
granted in
2024**

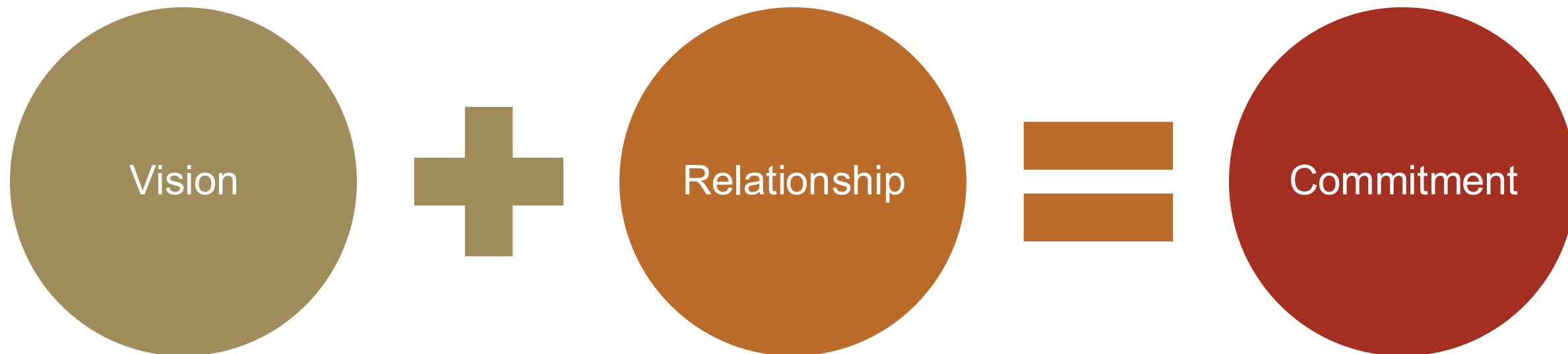
It's not about the materials . . .



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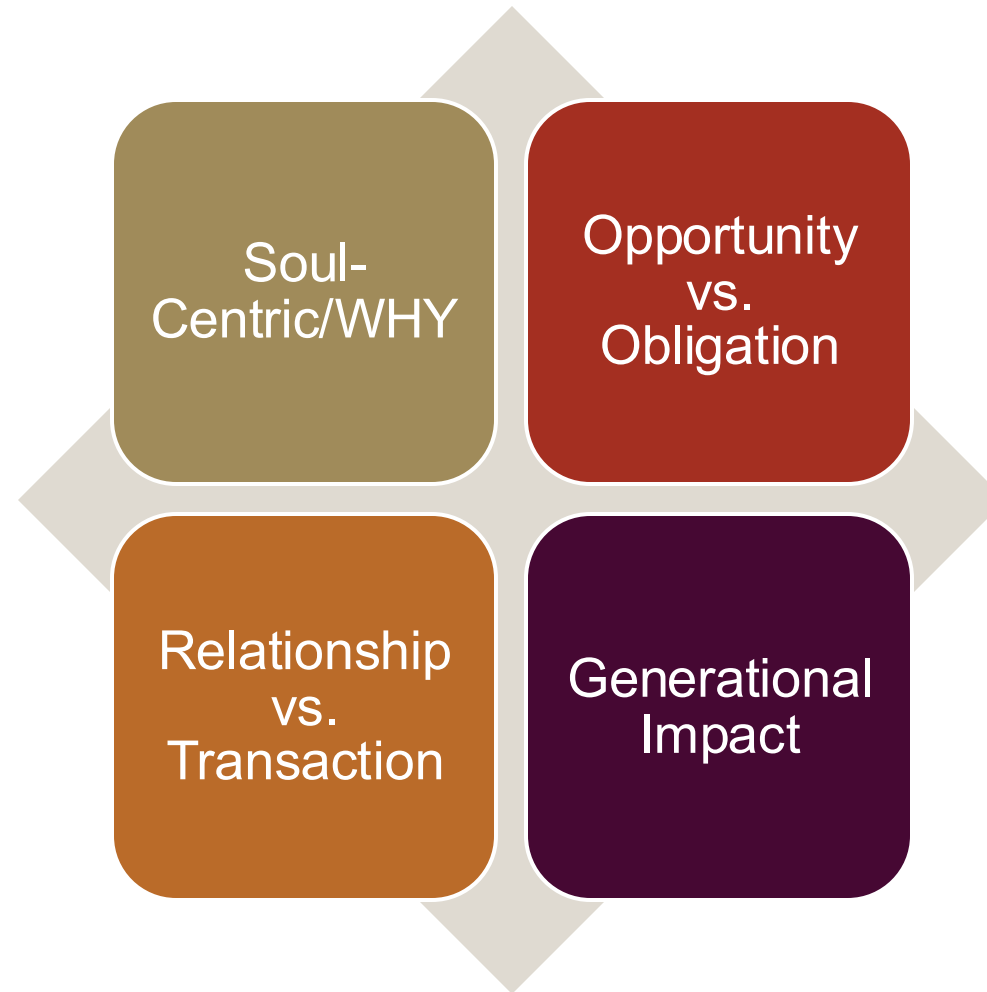
“The study results, however, indicated clearly that the parishes encouraging members to be more generous because it will enhance church's mission and create more opportunities for spiritual growth receive MUCH HIGHER contributions from their members than the churches asking members to contribute more merely because various needs of a parish community should be addressed.”

SCOBA 2015

Our Call to Give



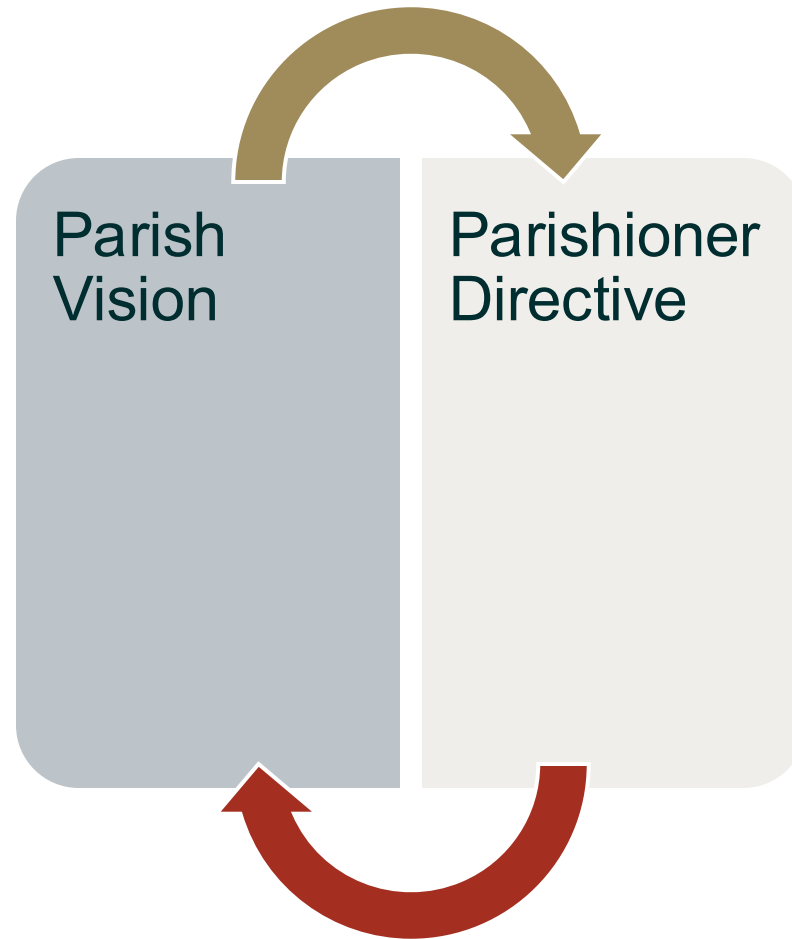
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Setting the Course



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Invitation =
Opportunity



Ask = Need

WHAT will position you for success . . .



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Lessons Learned



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Vision

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and directives for
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*“One generation shall commend your
works to another, and shall declare your
mighty acts.”*

Psalm 145.4:



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Remember your parish in your estate plan.



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Thank you.

Melpomeni N. Murdakes

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goarch.org/PlannedGiving