



Spirit

Springboard

Resolved: Expand stewardship

I love the beginning of a new year. It's a great time to make resolutions that get you off to a fresh start. As 2017 gets rolling, I encourage you to resolve to raise the level of stewardship in your church this year.



Here are four ideas I hope you will consider:

- Conduct an **annual stewardship campaign**. While most churches hold campaigns in the fall, others focus on stewardship in the first quarter. Whatever the timing, it's never too early to start planning. The stewardship program we recommend is "New Consecration Sunday" by Herb Miller. It's inexpensive, easy to follow and effective.
- Set up an **online giving option**. More people than ever before are operating "checkless" and pay their bills and expenses online. An online payment service is relatively easy to set up and use. Heartspring can provide guidance on how to create one.
- **Read** and encourage church leadership to read *Not Your Parents Offering Plate: A Vision for Financial Stewardship*. Clif Christopher has written an easy-to-read book full of

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Goolsby's generosity lives on through charities close to her heart

HELEN GOOLSBY had a great love for the church and a lifelong interest in helping those in need. With a career as a secretary for Texaco, Goolsby was not a wealthy individual. However, she was frugal in her spending and wise in her investments, ensuring she had something significant to leave to others. Never having married or had children, Goolsby felt called to support her church and local charities with her gifts.

In 2005, Goolsby attended a wills and estates seminar at her church, Westminster UMC, conducted by Heartspring President and CEO Rev. C. J. Taylor. Afterward, Goolsby called Taylor to discuss her estate plan and her charitable goals. After learning more about her options, Goolsby established a gift annuity to support the Star of Hope Mission in Houston. She appreciated both the significant tax deduction and annual income provided by this approach.

The following year, she established a second annuity to support Salvation Army and a third to support Paralyzed Veterans of America. She received income from each annuity for life and the balance of each went to support its respective charity.

In late 2006, Goolsby spoke with Taylor again about her charitable goals, including a desire to leave a bequest in her will to support the church. Working with her lawyer and other professional advisors, Goolsby created a will that left 80 percent of her estate to Westminster UMC and 10 percent each to Shriners Hospital and St. Jude Children's Hospital.

Today, six charities important to Goolsby receive a distribution each year from the memorial funds she established at Heartspring. By planning ahead, Goolsby ensured that the ministries she cared about will continue to thrive well into the future.

For more information on estate planning or creative ways to accomplish your charitable goals, contact Heartspring at 713-533-3780, 800-521-9617 or office@heartspringmethodist.org. ■



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Improving your bottom line: 2017 tax seminars

KEEPING UP with the changing financial regulations that apply to churches and clergy can be challenging. Heartspring Methodist Foundation and the Texas Conference once again are sponsoring two Clergy and Church Finance Tax Seminars in 2017 to help.

Clergy taxes

Learn about changes to current tax laws and payroll issues related to ministers including employment status, housing allowances, reimbursable expenses, tax-free benefits, retirement plans and more. The presenter will be using the 2017 version of Zondervan's "Minister's Tax and Financial Guide," a copy of which is included with your registration. This seminar is approved to offer three credit hours of continuing professional education (CPE) credit; there are no prerequisites to attend.

February 15 at St. Paul's UMC, Houston
February 21 at Marvin UMC, Tyler

Seminar Schedule

8:45 am	Registration
9:15 am	Clergy Tax Seminar
12:15 pm	Lunch on your own
12:45 pm	Registration (PM session only)
1:30 pm	Church Finance / Legal Update Seminar
4:00 pm	Wrap up



Church finance

This session focuses on relevant changes to current tax laws as they apply to churches. It also covers the basics of general church finance, including how to handle unique issues related to church employees and contractors, reimbursement plans, charitable gifts, tax deductible contributions, expense reimbursement, financial records and reporting, and more. The presenter will be using the 2017 version of Zondervan's "Church and Non-Profit Tax and Financial Guide," a copy of which is included with your registration. This seminar is approved to offer

2.5 credit hours of continuing professional education (CPE) credit; there are no prerequisites to attend.

Speakers

Frank Sommerville will present the Houston seminar. An attorney with the law firm of Weyer, Kaplan, Pulaski and Zuber, PC, he has served nonprofit institutions of all sizes as a bookkeeper, accountant, auditor, tax advisor and advocate, litigator and legal advisor. Sommerville also is a discussion leader for the Texas Society of CPAs (TSCPA) on nonprofit issues. His law practice concentrates on taxation, church and nonprofit legal issues, estate planning, probate and related taxation.

Rev. Nate Berneking will present the Tyler seminar. He is director of finance and administrative ministries for the Missouri Annual Conference. He attended seminary at Emory University's Candler School of Theology a few years after his work as an attorney in corporate law. He served as pastor in St. Louis and Chesterfield, Missouri, before joining the staff of the Missouri Annual Conference. Berneking is currently writing a book on clergy finance slated to be published in 2017.

Sign up today

Register and pay online at www.heartspringmethodist.org. Walk-in registration is available, but space and supplies are limited and those not pre-registered will be added on a first come, first served basis. Contact Krystol Wheeler at 713-533-3780, 800-521-9617 or office@heartspringmethodist.org with any questions. ■

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fresh ideas. It is also a good option for an adult Sunday School Class study.

- Invite Heartspring to conduct an **estate planning seminar** called *Provide and Protect*. This free 50-minute seminar covers the requirements for an estate plan in Texas and introduces ways to be charitable. Each participant receives a copy of the book *Provide and Protect* as well as other helpful materials.

The churches of our conference that have shown significant growth in their giving are the ones who have been very proactive and intentional about raising awareness of

Christian stewardship. We do invite you to "resolve" to do the same in 2017. As we like to say, "Our ministry is helping your ministry succeed." Give us call or contact us. We would love to discuss these ideas and other ways to raise stewardship awareness and enhanced giving at your church.

Grace and peace,

Rev. C.J. Taylor

Financial Corner: Monitoring expected volatility

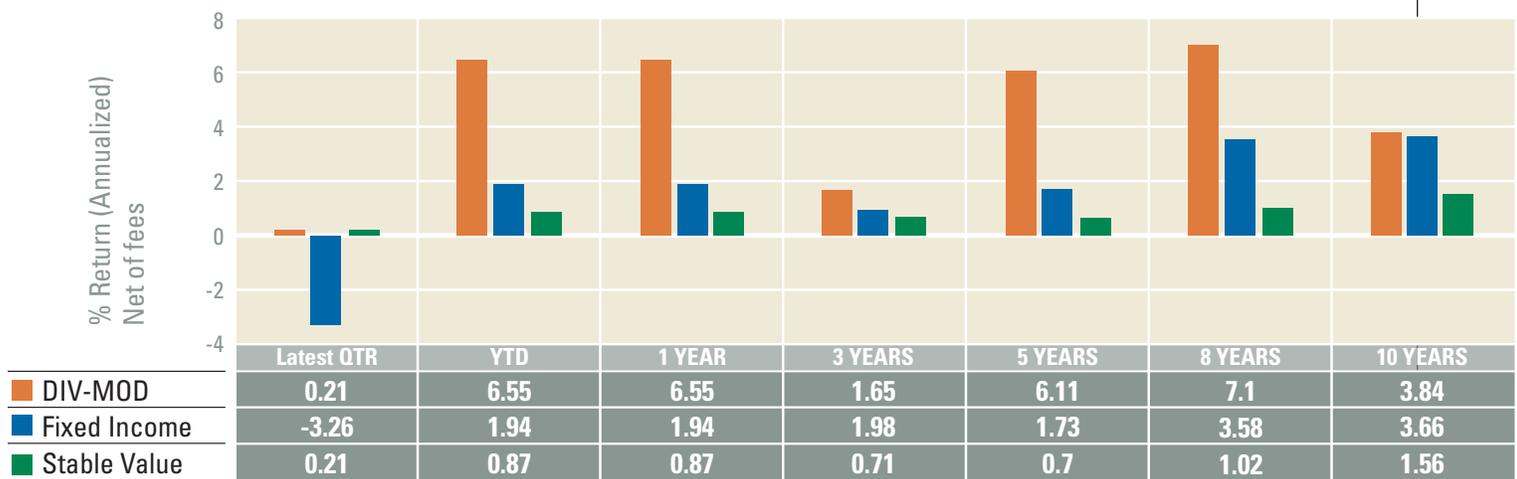
AS THE NEW President and his administration enter office and settle in to the first 100 days, markets are sure to see a bit of volatility. Uncertainty and concern over potential changes have investors watching the markets closely. Heartspring will continue to monitor and make changes as

needed while we remain focused on our long term goals: diversified investments in high-quality instruments within the socially responsible mandates to provide long-term stability and growth. No matter what happens with the market, our ministry is helping your ministry succeed. ■

One-stop shopping for financial information

For those of you who want more detailed market data, reports on Heartspring fund performance, and other investment and financial news, visit the Financial Corner on our website www.heartspringmethodist.org/financial-corner. There you'll find our most current performance, as well as other tools and resources, such as market news and commentary from our fund managers, updated monthly.

PERFORMANCE: 4th QUARTER 2016



Great expectations: Jumpstart stewardship, planned giving

MANY CHURCHES struggle with proper stewardship education, including discussions about planned giving and other ways to support the church. Talking about money can be hard. However, with the United Methodist Church in decline, and the number of baby boomers on the rise, it has never been more important to talk about planned giving than right now.

More eligible donors: Older donors tend to give more and the average age of the United Methodist increases year over year. Clayton Smith, author of *Propel: Good Stewardship, Greater Generosity* and executive pastor of generosity at Church of the Resurrection in Kansas, says his church membership has seen a 400 percent increase in the

number of baby boomers (born between 1946 and 1964) in the last 10 years.

“Great wealth transfer”: The largest transfer of wealth in history is happening right now. An estimated \$59 trillion is being passed from one generation to the next. How much is your church slated to receive?

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Tough competition: According to Smith's book: "Annual giving to religious causes has declined from 52 percent of the charitable dollar to 31 percent while giving to nonprofit organizations has increased every year." American philanthropy is a highly competitive arena. Universities, hospitals and countless other nonprofits, including local churches, compete daily for the charitable dollar.

So, why is it that churches are receiving less of the charitable dollar than other nonprofits? According to Heartspring Vice President of Development Mark Woodward, it's simple: "We're not asking for it."

Limited expectations: Due to the decline of the mainline church as a whole, and decreasing loyalty to a particular denomination, many churches have tempered expectations for members. Clif Christopher, president of Horizons Stewardship Company, speaks often about the difference between low-expectation churches and high-expectation churches. High-expectation churches create a culture of extravagant generosity and expect their members to give regularly.

What can you do to improve the conversation in your church about the future? A few essential concepts are outlined below to help you get started:

Create a culture of high expectations

- Create a development plan and work it diligently
- Develop/revamp your new members class to include education on giving
- Make "the ask" regularly and incorporate it into every-day conversation
- Hold regular estate planning seminars for all adult Sunday school classes



Create compelling call to action

- Define/promote purpose of planned giving
- Focus on ministry impact
- Set tangible, measurable metrics for goals

Hold personal conversations regularly with key donors

- Start with at least 15 to 20 top donors
- Have at least one meeting per month for two years

Tell success stories often

- Recognize legacy givers
- Share testimonies during church services and in communications
- Talk about how endowment funds are being used for ministry

Personalize stewardship/planned giving sermons

- Draft or find sermons related to planned giving/stewardship and deliver at least monthly
- Share planned giving tidbits regularly with the congregation

Begin/develop & promote legacy society for key donors

- Recognize key givers with annual dinner or celebration event
- Capture each person's giving story and share it often
- Get them involved with promoting planned giving

Hold networking/accountability meetings with other churches of similar size

- Meet twice a year to discuss six-month plan
- Hold each other accountable for measurable goals

Heartspring is ready to help with free estate planning seminars, stewardship education, charitable giving vehicles, and other tools and resources to help take your congregation to the next level. For more information, contact us at 713-533-3780, 800-521-9617 or office@heartspringmethodist.org. ■

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The Heartspring *Spirit* is published quarterly by Heartspring Methodist Foundation for clients, friends and members of the Texas Conference of the United Methodist Church.

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