



**Workshop on Planned Giving for Parish Leaders**  
**Saturday – March 11, 2017 – 9am – 12:15pm**

**at the Cathedral Church of St. Luke (Great Hall)**  
**130 N Magnolia Ave, Orlando, FL 32801**

*Both parishes with an existing Planned Giving ministry and/or an Endowment, as well as those without one, will benefit from this workshop. This workshop reviews best practices and empowers leadership to take the best, next steps for their congregation!*

**First Workshop 9:00 am – 11:00 am**

**Setting Up a Planned Giving Program for Your Parish**

Take the mystery out of planned giving for your parish. Learn in easy to understand terms how planned giving differs from annual stewardship and capital campaigns, and how your parish can build endowments through wills and life income and other planned gifts. After a review of the planned giving instruments, you will learn about the importance of a parish vision, protecting and growing your endowment, and how to invite others to remember your parish through estate and financial planning. You will leave the workshop with a plan of action.

**Break: 11am - 11:15 am**

**Second Workshop 11:15 am - 12:15 pm**

**Creating a Legacy Society and using *Planned Giving on Demand* for Your Parish**

Join us to learn how to use the resources provided by ECF's new toolkit, *Planned Giving on Demand* to encourage new gifts to support your parish's future through estate and financial planning. We will also review how to create and sustain a Legacy Society to encourage giving to your parish for decades to come.

**To register for the March 11<sup>th</sup> workshop, please contact Anne Michels at 407.849.0680 ext. 214 or [amichels@stlukes cathedral.org](mailto:amichels@stlukes cathedral.org) by Tuesday, March 7<sup>th</sup>.**



**James W.N. Murphy, CFRE**  
Managing Program Director  
212-716-6280  
JMurphy@episcopalfoundation.org

**Jim Murphy** is Managing Program Director of Financial Resources at the Episcopal Church Foundation (ECF). He oversees ECF's Financial Resource development programs and resources, including planned giving, donor solutions and endowment management. He leads workshops and works with congregations, dioceses, and other Episcopal organizations to enhance and develop their programs and resources.

Prior to joining ECF in 2008, Jim was Director of the Master of Arts Program and Program Manager for Lifelong Learning & the Center for Christian Spirituality at the General Theological Seminary. For more than 16 years he worked for a major international law firm in NYC, serving in a number of financial management roles. He has been an active volunteer leader in stewardship, parish administration, and Christian formation ministries in several Episcopal parishes in New York and New Jersey.

A native of Lansing, MI, Jim holds a Certificate in Fundraising from New York University's School of Continuing and Professional Studies, an MA in Christian Spirituality from the General Theological Seminary, and a BS from NYU's Stern School of Business. Jim is a member of the Association of Fundraising Professionals (AFP) and is a Certified Fund Raising Executive (CFRE).