25 Planned Giving Ideas
25 Planned Giving Ideas

Plan

Committee & People

Stuff

Video

Paper & Web

Events
Planning Planned Giving

Some Benchmarks for Launching a Legacy Giving Program

March 1:
- Defining objectives: Assess organizational strategy and set goals.
- Develop a strategic plan for launching a legacy giving program.
- Identify key stakeholders and their role in the process.
- Set up a legacy giving program committee.

March 2:
- Develop a case statement: Identify key facts and figures to support the program.
- Create marketing materials: Develop brochures, flyers, and other resources.
- Host a kickoff event: Invite key stakeholders to discuss the program.

March 3:
- Engage supporters: Reach out to potential donors and educate them about the program.
- Conduct research: Gather data on donor behavior and preferences.
- Develop a plan for reaching out to potential donors.

March 4:
- Develop a timeline: Create a schedule for implementing the program.
- Identify key milestones: Set targets for achieving specific goals.
- Monitor progress: Track progress against the timeline.

March 5:
- Develop a budget: Allocate resources for the program.
- Identify potential funders: Research potential sources of funding.
- Seek donations: Contact potential donors and secure commitments.

March 6:
- Develop a marketing strategy: Identify key messaging and use of media.
- Implement the strategy: Launch marketing campaigns.
- Monitor results: Measure the effectiveness of the marketing strategy.

March 7:
- Develop a plan for stewardship: Identify key fundraising strategies.
- Implement the plan: Engage supporters in the program.
- Evaluate results: Measure the effectiveness of the program.

March 8:
- Develop a plan for promotion: Identify key marketing channels.
- Implement the plan: Launch marketing campaigns.
- Monitor results: Measure the effectiveness of the promotion.

March 9:
- Develop a plan for engagement: Identify key fundraising strategies.
- Implement the plan: Engage supporters in the program.
- Evaluate results: Measure the effectiveness of the engagement.

March 10:
- Develop a plan for reporting: Identify key metrics for measuring success.
- Implement the plan: Track and report on program progress.
- Evaluate results: Measure the effectiveness of the reporting.

A PLAN
Committee
Pastor
Staff
Committee Structure & Position Description

CHURCH OF THE PALMS
Sarasota, Florida
PLANNED GIVING COMMITTEE
JOB DESCRIPTION

General Responsibilities
The Planned Giving Committee is the main committee responsible for developing and implementing the Endowment Development Program. It is the prime group that will provide the structure and the process designed to stimulate interest in the program. The Committee works closely with the Foundation, and it reports to the Session.

Specific Activities
- Adopts The Legacy Society, which serves as the focus of the ministry and manages the vehicle for expressing appreciation to those who qualify.
- Develops the criteria for membership, sparks interest in membership, sponsors the event and sets the date for annual meetings.
- Initiates a “frequent mail” program for selected members of the Church.
- Provides for brief educational presentations to promote awareness and stimulate interest.
- Sponsors a social event for Church Leadership and spouses, which features some major aspect of long range financial planning.

Time Requirements
The Committee normally will meet every month during organizational stages and thereafter on an as-needed basis.

Qualifications for Membership on the Committee
- Committed to the future of the mission and the ministries of Church of the Palms.
- Willing to help develop a program that is designed to be educational in nature.
- Has credibility as a leader.
- Shows sound judgment and decision making skills, but probably not from legal, accounting, banking, insurance, or investment fields.
- Willingness to enroll in The Legacy Society
Pastors’ Support

Basics  Cost  Time  Impact Level
Staff Buy-In

Basics  Cost  Time  Impact Level
• Thank you!
• You’ve really improved my life!
• So this is covered? So I owe you (practically) nothing!
• I feel like I owe you something!

• You are welcome!
• We are so glad to help and that we made a difference
• Yes, you are covered.
• You don’t owe us a thing.

• But you sound interested – you certainly can do something.
• Here is information on charitable giving. You can make what you’ve received available to those who don’t have it and cannot pay. Or, you can help with research so our resources are even better in the future.
Advanced

Equip Staff with:

1) Simple responses for a grateful giver ... as well as for the reluctant giver
2) Literature immediately for inquirers
3) Where the member can turn for information
I would love to give. But I don’t have those kinds of resources.

I understand. Especially these days.

You may be surprised at some of the creative ways... Most cases you give up nothing now.
SPEND the money
Inclusive.

We are just thinking of ways we can thank you.
Fill My Cup
Lord!

STUFF

Basics  Cost  Time  Impact Level
Legacy Society Pin

Enlarged Version

Basics
Cost
Time
Impact Level
Legacy Giving Lapel Sticker

$25 for 5 sheets of 24
For a Giver Unable to Attend
Gifts, Tokens, Thank You’s
Video
Legacy Video

Basics  Cost  Time  Impact Level
Charitable Bequests

Adobe Voice Video

Basics  Cost  Time  Impact Level
RULE 1: Listen

CULTIVATION
Can you tell me a little about what first brought you to... ?
You have played such an important role, can you tell me about your strong connection?
Listening to your stories/words, this mission is clearly close to your heart / means a lot to you.
Have you thought about the future of this mission...
We are truly blessed by your current giving. It is a major part of our funding. Have you considered making it last for future generations?

ASK
Let’s talk about the positive impact you can have on....
I wanted to discuss how you can help be a part of our vision and help change the future of...
Would you participate with us...
It sounds like you might be interested in learning more about how you/we can .... (solve
Jean Smith Remembers FPC in Her Will

I didn’t know Jean Smith, but I wish that I had. From what her friends have told me about her, she sounds a lot like my high school English teacher, Helen Langley, who was a real motivator who gave me a love for the English language. Jean was a slight woman, but as we all know, sometimes small packages can yield valuable gifts. That’s what Jean Smith was, a real gift to those who knew her.

When it was mentioned in a recent session meeting the fact that Jean had made a bequest to the church, Beth Holcomb’s face lit up. “Jean taught me junior and senior English at Hillsboro High. She was the best teacher I ever had.”

Jean’s best friend, a friend since the fourth grade, was Sandy Frye. Although Sandy attends another church, she is a member of our Jo King Circle because of her close friendship with Jean. Sandy and Jean were like sisters; they ate lunch together almost every day. Remembering Jean fondly, she told me “Jean was a wonderful teacher. She loved teaching. She loved people. She was a wonderful friend. We enjoyed each other’s company so much.”

Another friend of Jean’s was Myra Aimley, also in the Jo King Circle. Myra told me “Jean loved life, she loved people, she was always focused on others. When I was going through a tough time caring for my aunts and parents, Jean always wanted to know what she could do for me. I remember especially her sending me her favorite Scriptures, which were so comforting when I needed it most.”

Myra also remembers Jean’s beautiful prayers. I don’t know about you, but I’ve always believed that someone who can pray beautiful prayers most likely has a beautiful relationship with the one to whom the prayers are offered.

Jean went home to be with the Lord on August 27, 2002, at age 82. She never married, but had two cousins who lived in Missouri, so most folks who knew Jean said she had no close family. I’ve thought about that phrase – “no close family”. The more I’ve thought about it, the more strongly I feel that Jean Smith had more close family than most of us will ever have. And most of her close family was centered at her beloved church. Yes, Jean remembered her family – her church family – in her will. You and I were part of Jean’s family.

Thank you, Jean Smith, for remembering us in your will.
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Another friend of Jean’s was Myra Aimley, also in the Jo King Circle. Myra told me “Jean loved life, she loved people, she was always there when you needed help. When my mother was sick, and our parents, Jean always wanted to know what she could do for me. I remember especially her sending me her favorite Scriptures, which were comforting and gave me hope.”

Myra also remembers Jean’s beautiful prayers. “I don’t know you, but I’ve always believed that someone who can pray so beautifully, could be a wonderful Christian. That’s the kind of person Jean was.”

Jean went home to be with the Lord on August 27, 2002, at age 82. She never married, but had two cousins who lived in Missouri. She formed a close relationship with them. “When I think of Jean, I think of a close family”. The more I’ve thought about it, the more strongly I feel that Jean Smith had more close family than most of us will ever have. Jean’s close family was centered at her beloved church. Yes, Jean remembered her family – her church family – in her will. You and I were part of Jean’s family.

Thank you, Jean Smith, for remembering us in your will.

We met here, we were married here, our kids were baptized here. In a place where everything changes so fast, this church has been our constant, our foundation.

Thank you, our church family, for being there for us, carrying us through some of our hardest times and greatest moments. We want to be there for you too, so we wanted you to know that you are a part of our estate plans.

Testimonials
Jean Smith Remembers FPC in Her Will

What Will Be Your Legacy?

As Christians we rejoice with faith in the resurrection. Yet we also know the passage from life to death can be stressful on those who survive us. You can ease some of that stress by acting now to put your estate plan in order.

Who will be executor of your estate? Who will decide how your personal treasures are distributed? In addition to their own grief, can you imagine your loved ones struggling to find life insurance papers, bank accounts and other vital documents?

By creating a legal will or living trust, you can provide your next-of-kin with a peace of mind knowing that you have already determined how your estate will be distributed and who will care for minor children. They will still grieve, but they won’t face the daunting task of making decisions that you could have made.

A will also provides an excellent opportunity to remember ______________ Christian Church. A gift to the church through your will serves as a testament to...
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Jean Smith remembered us in her will. You and I were part of Jean’s family.

Thank you, Jean Smith, for remembering us in your will.

A Letter to Our Children

To Our Dear Children:

We want to tell you about a decision we made recently and some of the reasons behind it. But first, we want you to know that we are very proud of you and thankful for the honor of being your parents. You bring us great happiness.

As we get older, we find ourselves thinking more and more about our estate - and what to do with these assets when we are gone. Our holdings, though modest by some standards, represent a lifetime of working, saving, and investing. We want to dispose of these things in the right way, not only for you, but for us as well as the legacy we desire to leave behind.

Our first responsibility, as you know, is to care for each other. If one of us should predecease the other, we want the remaining person to have enough assets to live comfortably and to meet any unforeseen emergencies.

Our second responsibility is to pass along to you, our precious children, a portion of our estate, in order to provide you with a final and tangible expression of our love. It is also a way for us to assist you in meeting some of the challenges and opportunities you will face. The nature and value of these estate gifts will depend, of course, on our needs, taxes and the future economy.

Our third concern -- and this is why we are writing this letter -- pertains to our involvement in the Church. As
Planned Giving

LITERATURE

Basics  Cost  Time  Impact Level
Literature (Denomination)
Sampling of Materials:

- Composing a Legacy
- Guide to a Christian Will
- Planned Giving Leadership Guide
- Bequest Sample Wording
- Wills Emphasis Brochure
- Gift Annuity Brochure
- Living Generously Curriculum

Literature (Denomination)
Literature (Denomination)
A Christian Approach to Charitable Estate Planning

Estate planning offers Presbyterians the opportunity to make an enduring statement of faith. This act of stewardship can leave an indelible mark on your Church or a mission program of your choice. You may be surprised that even a small asset can be turned into a gift which will support your choices in perpetuity. You may even identify assets previously not considered that could be used to make a generous gift.

This booklet will concentrate on some of the charitable giving opportunities available through estate planning. Equipped with this information, you can more fully evaluate and discuss estate planning options with your financial and legal advisors.

What is Estate Planning?

Estate planning is the process of managing accumulated assets for the present and future. It is a written expression of your intentions for the protection and preservation of your assets during your lifetime and their management and distribution upon your death.

A will is the cornerstone of a sound plan, but on its own does not make an estate plan. A good estate plan should include decisions regarding guardianship for dependent children; power of attorney for your finances should you become incapacitated; and a healthcare proxy with the responsibility of making medical decisions on your behalf, if necessary. A living will directive stating your wishes for life support should also be considered to eliminate this difficult decision from loved ones.

Reducing estate and probate taxes may also be a consideration when planning your estate, allowing you to pass along more to your loved ones and charity with less to the government. Frequently, married couples' assets are held in joint ownership, so that when one partner dies the assets pass to the surviving spouse without going through probate. This is good in most cases, but for some it may be advantageous to consider a marital bypass trust to allow assets to pass to other heirs tax-free after the second spouse dies. Your financial or legal advisor can provide you with more details on these issues.

Charitable Giving

There are many ways to give. Although the choices may seem overwhelming at first, they are simply different options designed to fit various circumstances and meet individual goals. Only you will be able to determine how a charitable gift fits into your estate plan. For the purpose of planning with charitable intentions, giving can be divided into two broad categories.

Ways to Benefit Charity Later
- Bequest in Will
- Charitable Remainder Trust
- Life Insurance
- Retirement Account
- Real Estate

Ways to Benefit Charity Now
- Endowment Fund
- Donor-Advised Fund
- Charitable Lead Trust
- Direct Giving
- Appreciated Securities
Curriculum - Living Generously

This curriculum on LIVING GENEROUSLY is offered to you at no cost with the hope that it will encourage your congregation, church school class, small group, or whoever uses the curriculum to engage in a conversation that might open up new ways to “take hold of the life that really is life.” (1 Timothy 6:19)

Intro

Lesson I - How Much Is Enough
Lesson II - Becoming Unbound From Our Fears of Not Enough That We Might Live Generously
Lesson III - Living Generously In Order To Make A Difference
Lesson IV - Living Generously In Order to Participate In Transformational Giving For The Recipient As Well As The Giver
Lesson V - Living Generously Is Good For The Body
Lesson VI - Living Generously For Generations To Come

Literature (Denomination)
• Stickers
• Posters
• Rack Cards
• Tri-Folds
• Flyers
• Banners
• Literature
Different ways to support Grace Church include:

- Bequest through your will
- Charitable remainder trust
- Charitable gift annuity
- Gift of life insurance
- Beneficiary designation of a retirement plan
- Gift of Life Insurance
Endowment Fund:

The case statement (or mission statement) of your endowment should be stated here on the inside panel. This needs to be compelling to help this brochure and your committee represent the case to your donors. It should address why you need planned gifts and what you will do with them (description of your fund). If you have stories, it may be helpful to include one to demonstrate what the fund has accomplished.

GIFTS NOW

Appreciated Securities (or other assets): The gift of appreciated securities is most often in the form of common stock or mutual funds. Such a gift is a valuable way to benefit organization and for you to receive tax benefits based on the fair market value of the assets. Other appreciated assets, like real estate, may be gifted, but it is important to discuss these in advance with organization.

Real Estate: Real estate may be deeded outright to organization or left by bequest. The irrevocable gift of property may provide an immediate tax deduction and avoid capital gains. Due to complexities, be prepared to work with organization and qualified advisors to ensure that this is a suitable gift for both you and for organization.

Life Insurance: Make a gift of a policy or buy a policy making organization the owner and beneficiary.

Charitable Gift Annuity: The gift annuity is an irrevocable gift of cash or securities where you receive a predictable fixed income for life. At termination, organization receives the residual value of the annuity. There are also potential tax benefits depending upon your particular situation. You may request your own customized sample through ________.

Charitable Remainder Trust: The remainder trust is an irrevocable gift of assets into a charitable trust that provides you a fixed (Annuity Trust) or variable (Unitrust) income for life or for a set term. At the trust’s termination, the trust assets become a generous gift to organization. There are also potential tax benefits dependent upon your situation.

Charitable Lead Trust: The lead trust’s income payments are distributed to organization for a set period of years, after which the assets are transferred back to the grantor or whomever the grantor has named the beneficiary. This provides generous annual support for organization now, removes the asset from the estate and passes an asset to heirs with little or no tax. There is no immediate deduction for the lead trust.

Bequest: The bequest is a gift through your will or revocable trust that enables you to retain the asset during your life and provide significant support when you no longer require the asset. You may choose a specific item, a percentage, or a residual bequest. You may also choose to make organization a contingent beneficiary in case the heirs are unable to receive the estate.

Retirement Plan Assets: In some cases, retirement assets can be the heaviest taxed assets in an estate. Naming organization as beneficiary can avoid that taxation, enabling the asset to pass tax free to organization. You may also make organization a percentage beneficiary or a contingent beneficiary of a retirement plan.

Bank or Investment Account: Financial accounts can be a simple and inexpensive way to leave a legacy gift for organization. Contact your financial advisor to see how easy the process is to make organization the beneficiary of a particular investment or bank account.

How to make a planned gift

Basics

Cost

Time

Impact

Level
We/I would like to:

☐ LEARN MORE about planned giving in general.
☐ LEARN MORE specifically about the gift marked below:
☐ INFORM __________ of our/my gift marked below:

☐ Last Will and Testament
☐ Adding Codicil to Will
☐ Charitable Gift Annuity
☐ Gift of Life Insurance
☐ Gift of Real Estate
☐ Gift of Appreciated Stock

☐ Retirement Plan Beneficiary Designation
☐ Charitable Remainder Trust
☐ Charitable Lead Trust
☐ Transfer on Death (TOD) on Account
☐ Other ______________________

Thank you for considering a planned gift.

Please mail to: _______ , Address, City, State, Zip

www.Website.org
Planned Giving Web Pages
Web Pages

SUPPORT DAVIDSON

Across generations, Davidsonians have achieve uncommon impact, sharing the common bond of a Davidson education. We now draw upon that common bond as we join together to invest in the future of Davidson.

MAKE A GIFT ONLINE

GIVING OPPORTUNITIES

The Fund for Davidson

Naming and Endowment

Planned Giving

http://gamechangers.davidson.edu/support-davidson/
PLANNED GIVING

TYPES OF GIFTS

HELP US DEVELOP LIVES OF LEADERSHIP AND SERVICE

There are many ways to support Davidson College, but when you plan a gift to us as part of your long-term estate and financial plans, you will help us cultivate our students’ compassion, creativity, resilience, and moral courage. With your help, we can continue to develop the talents of our students and prepare them for lives of leadership and service.

There are many methods you can use to support Davidson students. Browse through our website to find the planned giving option that works best for you.
Ways to Give

Together, we can do more

Take the Next Step

Drawing on the talents of thousands of scientists, teachers, researchers, and health care providers, Johns Hopkins works to find solutions to problems challenging individuals and communities across the United States and around the world.

Every day, individuals, families, foundations, and corporations partner with us so that we may together invest in the future of humanity. When you give, you’re part of an elite group, one that is allowing Johns Hopkins to take on society’s most intractable problems and medicine’s most complicated cases, and one that will allow Johns Hopkins to continue to serve as a leading catalyst for positive change for generations to come.

https://rising.jhu.edu/waystogive
Ways of Giving

A Message from the Pastor

All of us are indebted to the past, to those who precede us. We drink from wells we have not dug. We enjoy liberties we have not won. We share faith whose foundations we have not laid.

At the same time, we are seeds of the future, for those who succeed us. We dream and envision and set things in motion. The fruition of our decisions will be known only to others whom we will not meet. We are called to partner in faith with those who have gone before us and to offer the best that we have to give to those who will follow.

NOW
Outright Gifts

Cash
Stock / Appreciated Securities
Real Estate

INCOME
Gifts That Pay Back

Charitable Gift Annuity
Charitable Remainder Trust
Charitable Lead Trust

Wills and Bequests

Member Stories

Edna Martin Remembers
FPC in Her Will

I didn’t know Edna Martin, but I wish that I had. From what her friends have told me about her, she sounds a lot like my high school English teacher, Mary Helen Lowry, who was a real motivator who gave me a love for the English language. Edna was a...

Read more »
EVENTS
FIFTH ANNUAL VALLEY PRESBYTERIAN FOUNDATION GALA
“AN EVENING WITH FRIENDS”
MARCH 5, 2010

PROGRAM
Welcome
Lee L. Henry, Master of Ceremonies
Invocation
Pastor Marilyn Manning
Dinner is Served
Dinner is served at 6 p.m.
Greeting from Foundation President
Charles Kurz II
Video Greetings
Pastor Woody Garvin
A Salute to the Future
Lindsay Uhlinger
Video Thank You
Karen Parthun
Balloon Raffle
Balloons sold during dinner at $20 each
Live Auction
Auctioneers: Dahler Auction

DID YOU KNOW THAT VALLEY PRESBYTERIAN FOUNDATION?
2. Has contributed $1,700,000 to our beloved Valley Presbyterian Church since its inception.
3. In 2003, contributed $266,300 to Valley Presbyterian Church.
4. Twelve trustees of the Foundation have the fiduciary responsibility to oversee the various endowments that are maintained under their control.
5. Encourages you to include Valley Presbyterian Foundation in your Will and Estate Plan.

VALLEY PRESBYTERIAN FOUNDATION TRUSTEES
CLASS OF 2010
George Bosworth
Bob Faller
Lee L. Henry
Toby Schnell

Class of 2011
William Bennett
Charles Kurz II
Mickey Remmen
Bob Tempo

Class of 2012
Edson Bore
Maurie Cohen
Kenneth Husband
David Winters

Director of Development:
San Iseal

Administrative Assistant:
Beth Streefland

2010 Banquet Co-chairs: Mickey Rumenich & Lee L. Henry

Basics  Cost  Time  Impact  Level
Events: Young Families
Events: Education

Passing Values
Events: Peer to peer

Presentation removed for public version
WHAT IS LIVE FORWARD, GIVE FORWARD?

A gift to your church through your Will could be the most important gift you ever make.

The everyday choices we make matter. How we live now affects not just our future, but the future of our families and our communities.
Welcome Non-Profit Sample Organization!

Your Planned Giving Site

On Deck in January

Test Ngo

Your 3 Most Recent Brochures

Action Items

- [Done] adam-richie is working on testing
- [Done] adam-richie is working on create-planned-giving-page

PlannedGivingNavigator.org
Planned Giving

Planned Giving in January

COMMUNICATIONS
- Blurb: Your Case
- Blurb: 174 Quotes on Generosity

COMMITTEE ACTION
- Booklet: Planned Giving

COMMITTEE EDUCATION
- Model Standards of Practice for the C...
- Planned Giving Committee Volunteer: ...
No Cash
RESEARCH
HOW AMERICA GIVES

Basics
Cost
Time
Impact
Level
<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Giving ratio</td>
<td>2.66%</td>
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<tr>
<td>... in 2006</td>
<td>2.79%</td>
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<tr>
<td>Total contributions</td>
<td>$42,107,000</td>
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<tr>
<td>Total adjusted gross income (AGI)</td>
<td>$1,584,219,000</td>
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<tr>
<td>Median contribution</td>
<td>$4,412</td>
</tr>
<tr>
<td>Median AGI</td>
<td>$136,657</td>
</tr>
</tbody>
</table>

**Breakdown by income bracket**

<table>
<thead>
<tr>
<th>Income Bracket</th>
<th>Giving ratio</th>
<th>Total contributions</th>
<th>Total AGI</th>
<th>Average contribution</th>
<th>Average AGI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to $25,000</td>
<td>4.98%</td>
<td>$975,000</td>
<td>$19,598,000</td>
<td>$2,500</td>
<td>$37,689</td>
</tr>
<tr>
<td>$25,000 up to $50,000</td>
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<tr>
<td>$50,000 up to $75,000</td>
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<tr>
<td>$75,000 up to $100,000</td>
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<td>$100,000 up to $200,000</td>
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<tr>
<td>$200,000 or more</td>
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PCUSA Demographic Reports
Presbyterian Mission Agency – Help for Congregations

Basics  Cost  Time  Impact Level