

# SETTING UP A PLANNED GIVING PROGRAM FOR YOUR PARISH

**SATURDAY, MARCH 2ND**

**10 AM TO 12:30 PM**

**ST. MATTHEW'S EPISCOPAL CHURCH**

919 TENNIS AVENUE, MAPLE GLEN, PA 19002

*Both parishes with an existing Planned Giving ministry and/or an Endowment, as well as those without one, will benefit from this workshop.*

*Please join Lori Daniels from The Church Foundation of the Diocese of Pennsylvania and James W. Murphy, CFRE from Episcopal Church Foundation, to review best practices on how to empower parish leaders to take the best, next steps for your congregation!*

## ABOUT

### OUR WORKSHOP

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 and other funds through wills and life income and various other gifts. After a review of the planned giving instruments, you will learn about the importance of a parish vision, building trust among parishioners, and how to invite others to remember your parish through estate gifts and financial planning, taking into account the many recent tax law changes.

(Sponsored by The Church Foundation of the Diocese of Pennsylvania)

## OUR

### SPEAKERS



**JAMES W. MURPHY,  
CFRE**

**Episcopal Church Foundation**  
**DIRECTOR OF STEWARDSHIP  
RESOURCES & OPERATIONS**  
800-697-2858  
jmurphy@ecf.org



**LORI DANIELS**

**The Church Foundation**  
**EXECUTIVE DIRECTOR**  
215-220-9886  
lorid@diopa.org

Refreshments Provided

[TO REGISTER CLICK HERE OR CALL ECF AT 800-697-2858](#)



**JAMES W. MURPHY,**  
**CFRE**  
DIRECTOR OF STEWARDSHIP  
RESOURCES & OPERATIONS



James W. Murphy, CFRE, Director of Stewardship Resources & Operations, oversees ECF's financial resource programs: planned giving, donor solutions, including ECF's Donor-Advised Fund program, and its new on-line fundraising resource hub ECF360. Active in ecumenical collaborations, he works with congregations, dioceses, and other Episcopal organizations to enhance and develop their programs and resources. Jim is the author of *Faithful Giving: the Heart of Planned Gifts* (an interfaith book on planned giving), General Editor and a contributing author for *Faithful Investing: the Power of Decisive Action and Incremental Change* (an ecumenical book on Socially Responsible Investing) and a contributor to *One Minute Stewardship* and *We Shall Be Changed*, all from Church Publishing Inc. Jim holds a Certificate in Fundraising from New York University's School of Continuing and Professional Studies, MA in Christian Spirituality from the General Theological Seminary, and BS from NYU's Stern School of Business. Jim is a member of the Association of Fundraising Professionals, Philanthropic Planning Group of Greater New York, the Nonprofit Alliance, and is a Certified Fund Raising Executive.

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**LORI DANIELS**  
EXECUTIVE DIRECTOR



## About The Church Foundation

The Church Foundation guides parishes and institutions within the Episcopal Diocese of Pennsylvania toward asset growth by providing cost-effective investment and endowment management services. Over its nearly 100-year history, TCF has both navigated the most challenging financial periods and made sound, long-term investment decisions, providing steady growth and security for churches and other episcopal entities in our diocese.

Executive Director Lori Daniels oversees and monitors The Church Foundation's investments to ensure financial integrity and serves the Board in its fiduciary duties as trustee and custodian for assets owned by churches throughout the Diocese of Pennsylvania. Lori holds an M.S. in Management with a Non-Profit Specialization and a B.S. in Finance.