

BRING YOUR ASSETS TO LIFE

Building a Legacy
The Diocese of Newark
April 25, 2026

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EPISCOPAL CHURCH FOUNDATION

INTRODUCTION TO ECF

THE EPISCOPAL CHURCH FOUNDATION

- Independent, lay-led inclusive non-profit founded in 1949
- Sole mission is to support Episcopal organizations
- Finance and leadership programs
- 25+ years in endowment management




Find us online at www.ecf.org



EPISCOPAL CHURCH FOUNDATION

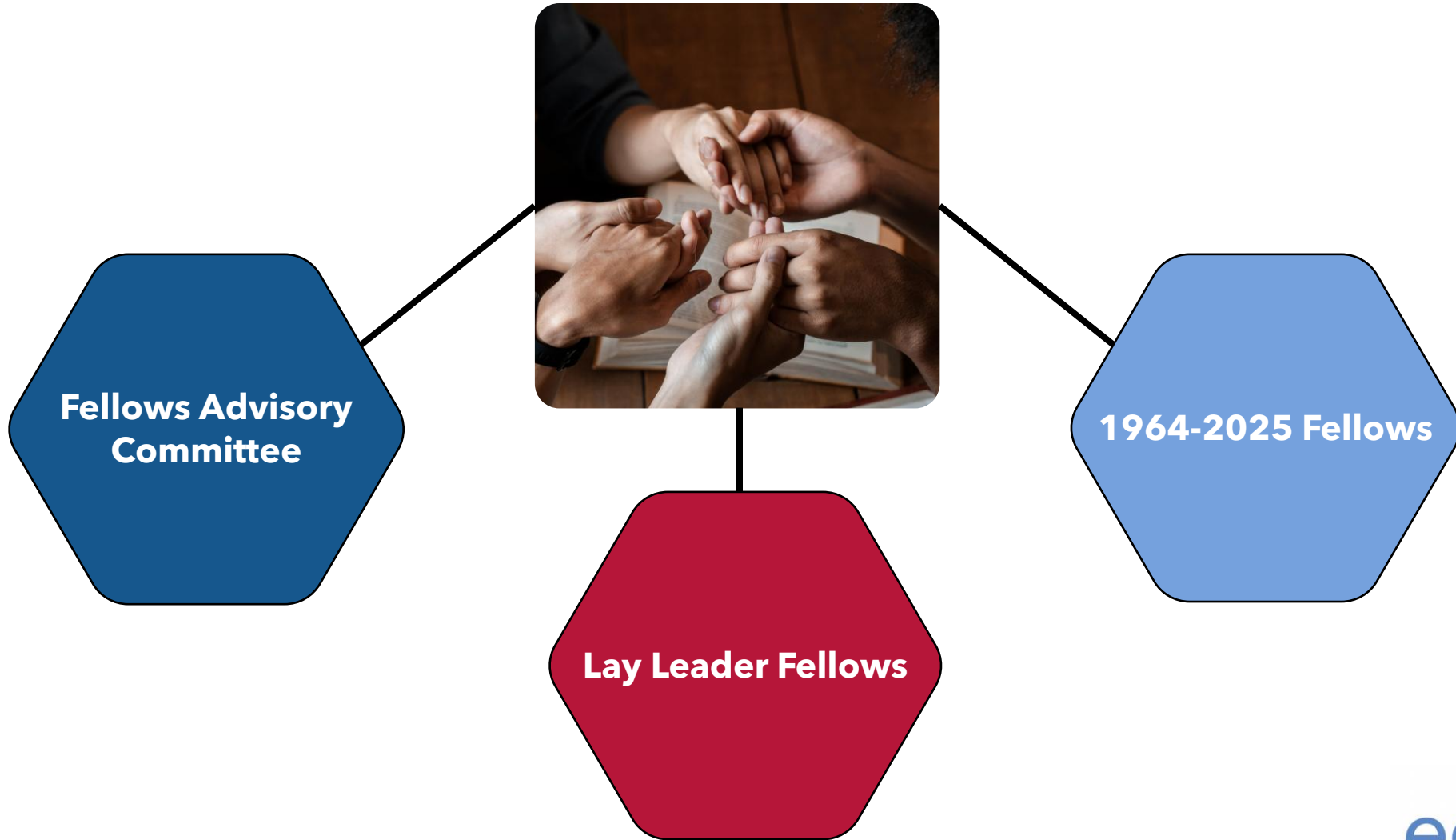
THREE FOUNDATIONAL PILLARS



-  **Endowment Management**
-  **Philanthropy**
-  **Shared Services**

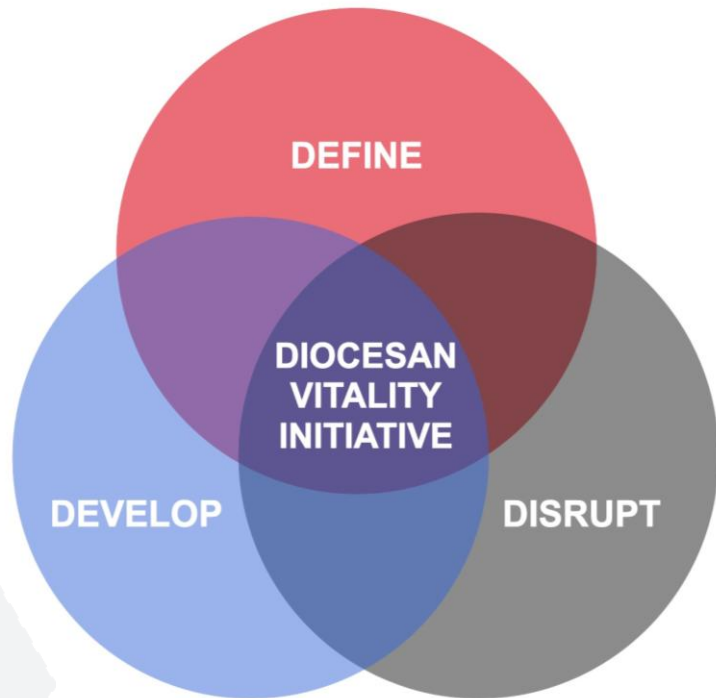
Services designed to strengthen faith and transform ministries

FELLOWSHIP PARTNERS PROGRAM

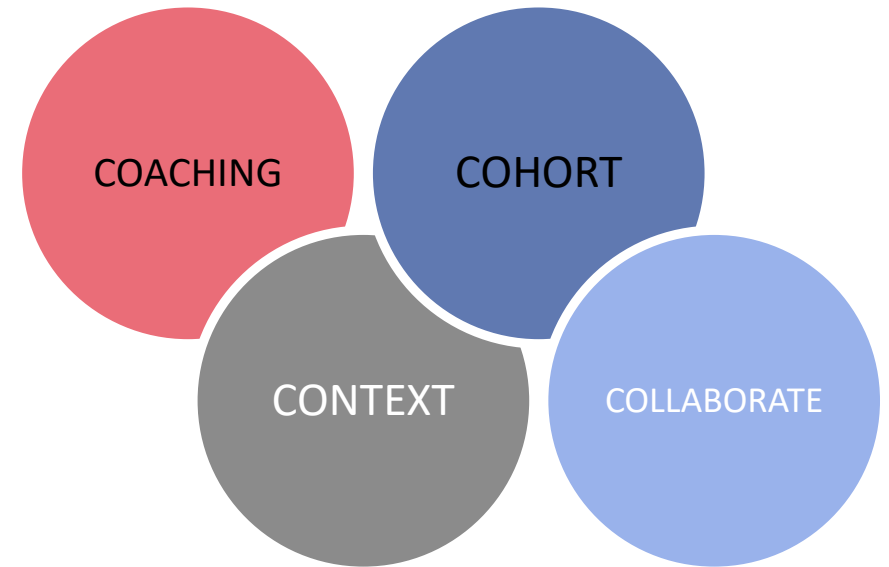


DIOCESAN VITALITY INITIATIVE

What DVI does:



How DVI does it:



ECF Endowment Management Overview

ECF ENDOWMENT MANAGEMENT

The leading provider of
endowment management
services to Episcopal
organizations

Episcopal Focus

- Over 25 years working with hundreds of Episcopal organizations
- Investor community with a similar mission and goals

Outstanding Service

- Missional commitment to service
- Lay Leaders familiar with Episcopal Church structures and church endowments

Our goal: *You expand your reach and impact with an expertly managed endowment.*

Our service: *Comprehensive, with investment management plus governance, giving, and administration.*

Our implementation: *Low-cost investment portfolios intended for institutional endowment funds.*

COMMUNITY OF EPISCOPAL INVESTORS

As of March 31, 2026*

392
CLIENTS

20
DIOCESAN CLIENTS

514
ACCOUNTS

\$935 million
ASSETS UNDER MANAGEMENT

Accounts

\$20 million+	8
\$10 million to \$20 million	12
\$5 million to \$10 million	25
\$3 million to \$5 million	26
\$1 million to \$3 million	83
\$500,000 to \$1 million	76
\$300,000 to \$500,000	55
\$100,000 to \$300,000	116
\$10,000 to \$100,000	112
Pending Funding	2

ENDOWMENT BASICS: WHAT IS AN ENDOWMENT?

What is an endowment?

An endowment fund is an institutional fund that, under the terms of a gift instrument, is “not wholly expendable by the institution on a current basis”

Key Concepts

1. For the long term - to support ministry today *and* tomorrow
 2. Invest to grow over time
 3. Enable an annual stream of distributions
- > UPMIFA, a state law, guides fiduciaries

Why endowment?

- Support for mission and ministry
- Improved financial stability
- Opportunities for organizational innovation

Prudence: The Endowment Standard



PROTECTION

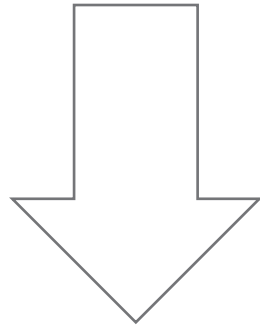


BALANCE



SUPPORT

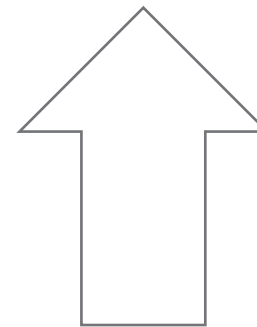
Prudence: The Endowment Standard



Enable Annual
Distributions



Preserve the
Value of the
Fund



HOW TO FUND AND GROW YOUR ENDOWMENT

The **ABCC's** of Endowment Growth

Assess - Understand your
Organizational Health

Build - Build Trust

Create a Dream - Create a Vision

Communicate - Tell the story
and communicate the impact of
your endowment



Assess

Understand and examine the ***Health of Your Community.***

1

How do your members/donors feel about the future?

2

What impression do your members/donors have of your resources?

3

What are your sources of revenue?

Build

Lay the groundwork to build ***the trust*** of your members/donors.

POLICIES

When was the last time you reviewed your policies and procedures?

- ❖ Who does/will oversee the endowment?
- ❖ Are you raising up new leaders?
- ❖ How is/will the endowment be managed?
- ❖ What gifts are accepted?

COMMUNICATION

How are you communicating to your members or donors?

- Sermons
- Bulletins
- Brochure
- Website
- Events
- Direct Mail
- Email
- Social Media

Create

Identify a ***purpose*** of your endowment and create a vision.

What is the purpose of your endowment?

Do you have a vision?

Does it inspire?

How does it show impact?

Communicate

Tell the story and communicate the impact of your endowment.

1

Communicate impact

2

Tell your story

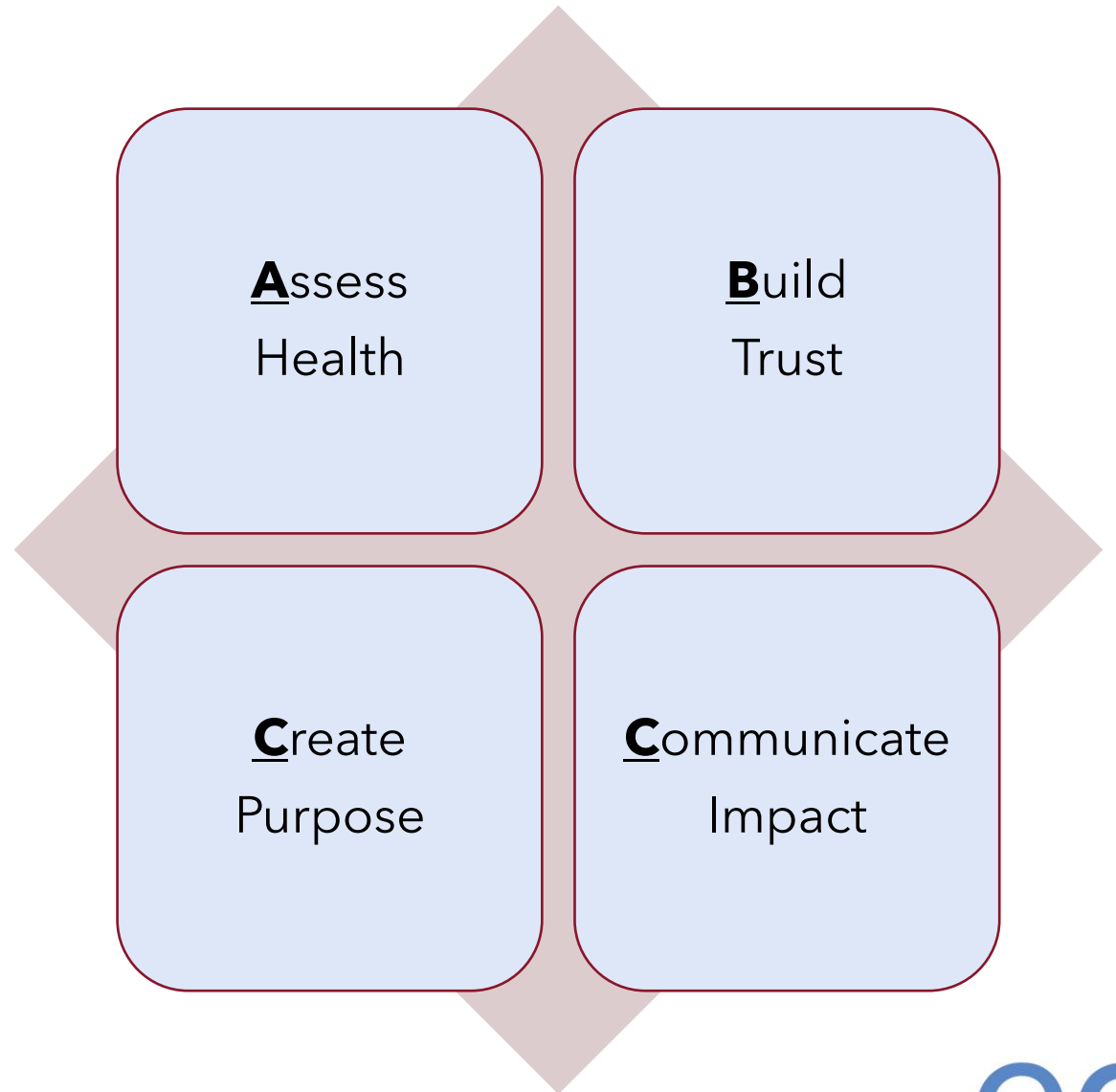
3

Raise awareness

4

Connect to mission
and ministry

Elevate the Invitation to Legacy



WHY ECF?

Exceptional Service and Strategy Designed for Sustainability of Episcopal Institutions



- **Customized Client Support**
 - Proactive, relationship-driven service
 - Tailored guidance shaped around your goals.
- **Deep Episcopal Insight and Alignment**
 - Decades of experience serving Episcopal parishes, dioceses, and institutions.
- **Investment Approach Built for Your Long-Term Goals**
 - **Diversification** across multiple dimensions, adapting as markets evolve in a disciplined, risk-aware framework.
 - **Delegated investment model (State Street Investment Management)** provides access to global research and professional expertise while retaining control of strategic decisions.
- **Fee-conscious fund implementation**
 - Open architecture manager selection

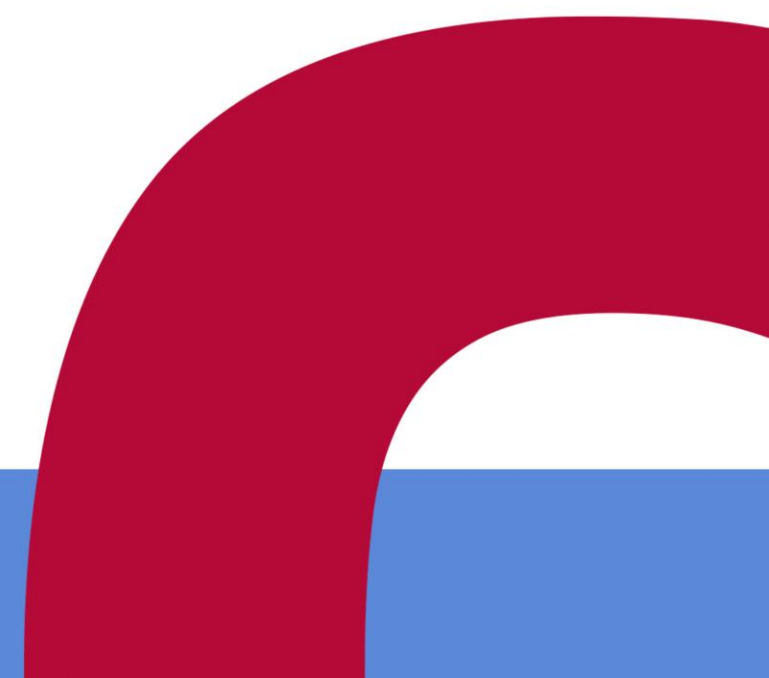
Notes: Diversification does not ensure a profit or guarantee against loss. Asset allocation is a method of diversification which positions assets among major investment categories. Asset allocation may be used in an effort to manage risk and enhance returns. It does not, however, guarantee a profit or protect against loss.

APPENDIX

GIVING RESOURCES

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Giving Resources for Clients

GUIDES

- Announcing the Creation of Your Endowment
- Crafting an Endowment Giving Brochure
- Legacy Sunday Planning Guide
- Endowment Marketing Guide
- Life-Income Gifts
- Legacy Society Guide & Timeline
- Processing Gifts of Securities

TEMPLATES

- Gift Acceptance Policies
- Endowment Gift Intention & Acceptance Forms
- Event Checklist
- Pledge Card Sample
- Sample Bequest Language
- Sample Communications Grid
- Sample Newsletter Blurbs
- Year-End Gifting Announcements

WEBINARS

Giving Strategies for Success
A conversation with development professionals answering your key questions

Legacy Society Events that Make an Impression
Learn how to start or reinvigorate your legacy society

Marketing Your Endowment
Learn how to create a promotion and communications strategy



Contact us at endowment@ecf.org to discuss your endowment giving questions and obtain materials and advice to help develop your own giving program.

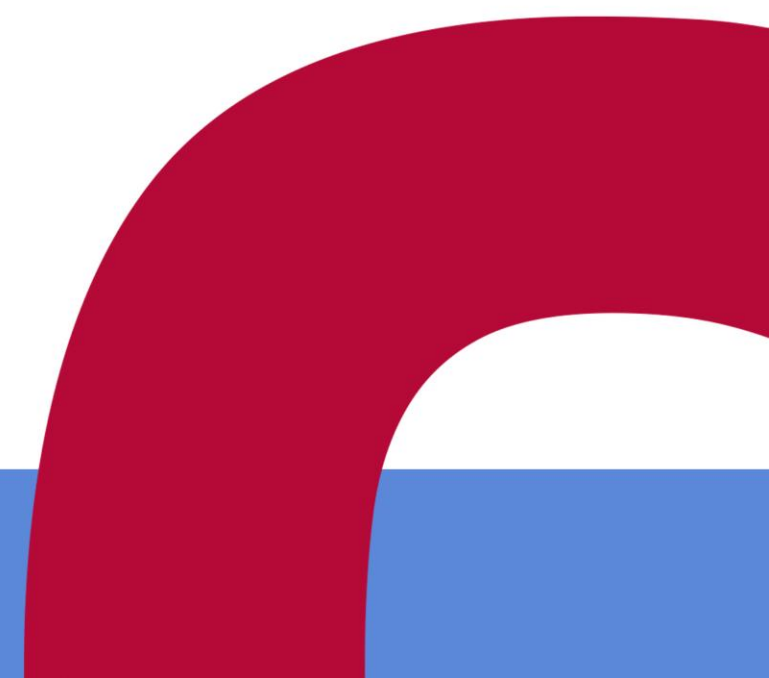
OVERVIEWS

Annual Giving & Stewardship | Conducting a Capital Campaign | Memorial Gift Policies & Guidelines

Legacy Societies

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Benefits of a Legacy Society

- Elevate your donors
 - Celebrate and thank donors for their gifts
 - Build excitement about what gifts facilitate
 - Sends a message to potential donors
- Opportunity for Witness
 - Not just about recognition
 - Donors giving witness to their faith through the church
 - Inspires others to do likewise

Benefits of a Legacy Society contd.

- Strengthen the donor bond
 - Legacy donors feel a strong connection to your church.
 - Legacy society reciprocates this connection
- Stay in your donor's plans
 - Legacy societies help keep you connected to donors
 - Lost connections risk lost gifts
 - Remind them of the good their gift will do