

Seasons of Generosity

A Practical Guide to Raising Up Legacy Giving in Your Church

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Missioner for Stewardship and Legacy Giving

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Opening Prayer

God of all times and generations, teach us to number our days that we may apply our hearts to wisdom. Open our hearts to see how our lives, our stories, and our choices can bless others and bear witness to your love. *Amen.*

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What we'll talk about today – 4 parts



Overview, including some donor psychology



Legal and Estate Planning



Episcopal Church Foundation – ins and outs of endowments and other vehicles



Pulling your own plan together, Legacy society, communications

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Legacy as Spiritual Practice



Foundational lessons

- Be a Blessing
- Faith that extends beyond us
- We receive -> we pass on
- What we love shapes what we leave
- Not just financial. It is about faith lived over a lifetime

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What is the Opportunity?

Remember the 7's

- \$78,000 = average charitable bequest
- ~7 years to be realized
- +70% increase in current giving

These are long-term, relationship-based gifts, that deepen giving now,
not just later.

Major gifts...for the rest of us

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What is “Legacy Giving”

- Legacy Giving = Planned Giving = Deferred Giving
- Generally
 - A gift in a will or estate, or a beneficiary designation
 - Often the largest gift someone makes

A way to say, “This mattered to me – and I want it to continue”

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Missed Opportunity

Fewer than 6 percent of Americans include a charitable bequest in their will or estate plan—but one in three say they would consider doing so if asked. In one survey, only 17 percent of donors who said they were *open* to a conversation about legacy giving had been *invited* to have such a conversation by their favorite charity.

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Legacy Giving Overall

- Low overall adoption
- Stronger interest among Affluent & Older Adults:
- Generational differences
- Significant missed opportunity
- Giving Patterns

Why It Matters: Bequests account for over 90% of all planned gifts

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Why It Doesn't Happen - Avoidance

Why doesn't this happen naturally?

People avoid it thinking about their own death

* I'll deal with that later

* That's not for me yet

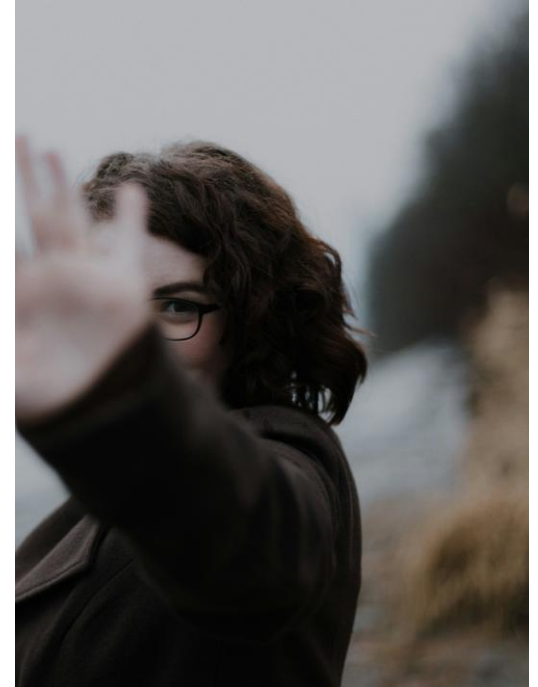
* I don't want to think about it

Reality: Most people don't act... until they're invited

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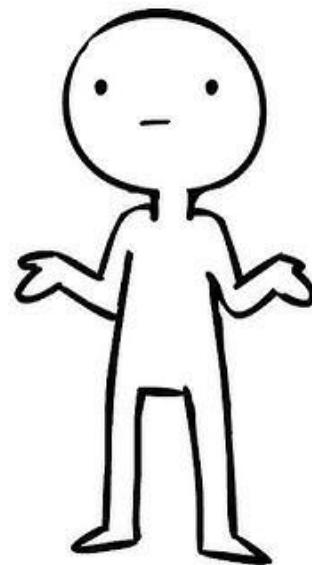


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Why It Doesn't Happen - Awareness

- People may not know:
 - You accept legacy gifts
- If they hear from other charities—but not from you:
 - They assume it's not something you do
- Key takeaway: “If we don't say it, they won't know.”



Why It Doesn't Happen - Timing



- We don't control the moment
- You want to be top of mind at the right time
- Presence > Urgency

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Another consideration...

A generation ago, many families primarily gave to their church. Today, people give to many organizations, and they build relationships with those organizations.

- Schools, hospitals, national no profits
- They focus on legacy giving
- Competition/we might not even be considered

Churches don't talk about legacy giving,
so they don't receive legacy gifts.

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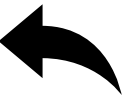
Why Churches are Uniquely Positioned



Why churches are different

- Lifelong relationships
- Trusted space
- Present at life's biggest moments

Legacy Giving is driven MORE BY
LOYALTY THAN BY WEALTH



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Slow and steady: drip, drip, drip

Not a campaign

- Not a one-time push
- Not a pledge drive

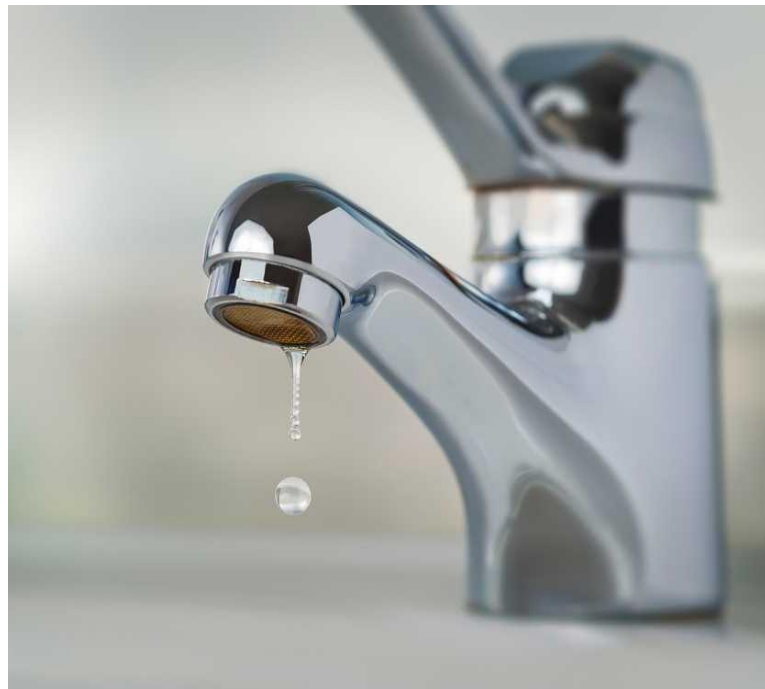
A culture

- Normalize conversations
- A simple repeated message “Did you know you can leave a gift in your will to help our church be here for future generations?”

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Practical steps for communications

Think “Stickiness”

- Bulletins
- Newsletters
- Information Center
- Vestry Agenda

Think Gatherings

- Annual Meeting
- Legacy Society

Think Website

When?

- Year-round
- Seasonal
- Lent, All Saints
- History Months
- Consistent, not intense



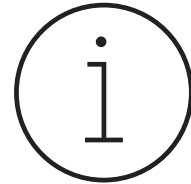
Why do you need it on your website?



People will look here



They need basic
information: Church name,
Address , Town. EIN



Informational, not sales-y

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“Adjacencies”

- People are already thinking about:
- Downsizing
- Caring for aging parents
- Having “The Conversation”
- Retirement transitions
- Family legacy and values
- Storytelling Opportunities
- “In Memorium”
- Remembering the Saints
- Grandparenting – passing on your values

Simple message

The message (keep it simple)

Did you know you can leave a gift in your will to
support the church?

That's it. Repeat it gently and consistently

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Legacy Gifts and Endowments

“Where will my gift go?”

- Without an answer, one assumes it just goes to the budget
- Endowment=Long term ministry support
- “Symbolic immortality”
- A belief in the future

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What an Endowment can do for your church

Endowments help churches:

- Weather uncertainty
- Support ministry beyond annual giving
- Care for buildings without crisis giving
- Fund innovation and new ministry

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When someone includes the church in their will...

- They have literally lifted you up to the level of family
- Not just a donor
- Respond pastorally, not transactionally
- Honor the relationship



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When a legacy gift is promised

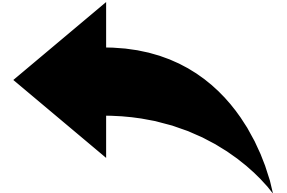
- This is not a \$20 bill in the plate
- It reflects
 - Thought, Prayer, Deep Commitment
- And... **IT IS REVERSIBLE**. You need to steward the gift
- Respond appropriately
 - Thank quickly, personally, stay connected



What's next...

- What about the legal side?
Wills, estates, and gift planning
- What about endowments?
Do we need one? How do they work?
- How do we make this real?
What will a legacy giving plan look like in *our* church?

Legal guidance → Endowment strategy → Your church's action plan



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