

SUGGESTED PROMOTION CHRISTIAN ESTATE PLANNING CONFERENCE

When you mention “Estate Planning” from the pulpit, few ears perk up. For one thing, only “old people” need to worry about estate planning. Right? The target audience is ADULTS, but ALL adults. Young adults need to understand the importance of planning an estate, especially in making arrangements for the most precious asset of all – their children! Median adults need to understand the importance of planning before it is too late. Senior adults realize the imminence of death, but often do not want to think about the reality of what happens at such a time.

Yet as Christians, we need to be wise stewards of all that God has given us! As good stewards, we must manage our estates effectively. This involves protecting yourself with enough assets and income to cover your lifetime, providing adequate resources for your family (particularly spouse and children), and leaving a legacy of support for those charitable causes that have been special in your life.

Our experience has shown that the following items help generate the concern and attendance at our seminars:

- ‘ Announcements from the pulpit, preferably from the pastor. That is one reason we provide free wills and trusts for ministers and their wives in Arkansas. If the pastor understands the need for an estate plan, it is likely that he will help his people understand the importance! Too often a pastor experiences an estate problem in his own family. Then, after it is too late, he understands the importance of planning prior to death.
- ‘ In all publicity, emphasize that the Foundation is not coming to sell anything. We are not fund-raisers, nor do we sell products. Some people are fearful that we are coming to “take money out of the church.” Nothing could be farther from the truth. We do provide many services, including money management for churches; but that is not the emphasis of our seminar. Our emphasis is purely educational!
- ‘ Promotion in the church newsletter and in the local newspaper (if community participation is desired). A sample press release is enclosed.
- ‘ Posters placed on church bulletin boards and/or in community businesses.
- ‘ You can emphasize that a CFP, MBA or an attorney (depending on which one of us is teaching the seminar) will be presenting the seminar. Where else can you go and have the opportunity to learn from such individuals, ask them particular questions, and not pay a fee?
- ‘ Personal appeals by the pastor and staff to those particular individuals who need our help. Note especially families with no children, or families with children who are unable to manage an inheritance (handicapped, etc.). This could be a phone call, a personal letter of invitation, or both.
- ‘ In the past, some churches have added us to their prayer list in preparation for the event. Not only do we need the prayer support, but such an emphasis helps affirm the fact that for some people this could be the beginning of a perpetual legacy left to help support their church or other such ministry that they love.

Please feel free to adapt any or all suggestions to meet the climate of your local church. We look forward to our experience with your people.

SEMINAR SCHEDULE

If your church has not already established a schedule for a Foundation seminar, it might be helpful to know how other churches utilize the Foundation. Foundation staff have taught seminars on a variety of topics including Christian Estate Planning, Tips & Techniques on Charitable Giving, Giving to a Building Fund, Successful Christian Financial Management, Christian Financial Planning, and a host of church legal/business issues.

Typically, the Foundation staff will present seminars at a time appropriate for the church members. This has been done most commonly on Sunday afternoons and at senior adult luncheons, but some churches have used the Sunday evening service time, Wednesday evening, or a weekday. To illustrate the variety, here are a few church schedules from recent months:

- Preach a.m. sermon on stewardship, Meet individual families in afternoon for conferences, teach Christian Estate Planning during Discipleship Training time, and speak in the evening service on Foundation ministries.
- Present Christian Estate Planning seminar to Senior Adult luncheon and meet with individuals after the luncheon.
- Successful Christian Financial Management (a LifeWay program): Present seminar on 7 Principles of Christian Stewardship to all adults and youth during Sunday School, preach on tithing in the a.m. services, teach Budgeting and Debt Management in an afternoon seminar, and preach in evening service on grace giving.
- Preach in a.m. service on stewardship. Church hosts a luncheon for interested families and provides child care for a seminar immediately following lunch.
- Present Foundation ministry with Estate Planning emphasis during Wednesday night service.
- Present seminar on Monday morning and then meet with individual families during the afternoon.

Actually the schedule may be limited only by our own creativity! The Foundation staff simply wants to do what works in the individual churches.

If the Foundation speaker is also a preacher, then the schedule may be adjusted to allow for supply preaching. As a ministry of stewardship, the Foundation seeks to use its staff in ways that benefit the churches.

A church will need to decide when the best crowd can be assembled and what topic or topics will best fit the church needs. The church is responsible for the publicity and promotion.

CHURCH PRESS RELEASE

Are you a good steward of your estate?

As Christians, we are called to be good stewards of all our resources, even our estates. What would happen to your children, to your property, and to your assets if you died today? You can find answers at the ***Christian Estate Planning Seminar*** being held on _____ (Day), _____ (Date) at _____ (Time) in the _____ (Place).

Issues such as wills, guardians, trusts, gift and estate taxes, and charitable giving techniques will be covered in the seminar.

The seminar will be led by Dr. W. David Moore, President of the Arkansas Baptist Foundation in Little Rock. The Foundation is the trust agency of the Arkansas Baptist State Convention and specializes in estate planning and charitable giving. Currently, the Foundation manages around \$110 million in assets which support numerous Baptist causes as chosen by the donors.

A graduate of Samford University, Southwestern Baptist Theological Seminary, and Baylor University, Dr. Moore is an ordained minister who pastored churches for 19 years. A graduate of the Cannon School of Foundation Management, Moore is a Certified Financial Planner (CFP®) practitioner. He holds a Series 7 (securities) license and is a Certified Specialist in Estate Planning (CSEP). He also teaches Estate Planning at the University of Arkansas at Little Rock in the School of Business.

There is no charge for the seminar.

Christian Estate Planning Seminar

(Name) Baptist Church
(City), AR
Fellowship Hall

(Date)
(Time)

Presented by
W. David Moore, Ph.D., CFP®
President, Arkansas Baptist Foundation
Little Rock, AR



There is no charge for this seminar.