

## Planned Giving Board (PGB)

The Board is responsible for:

- Advising the Vestry regarding the receipt and disposition of gifts to the Parish.
  - Managing endowment funds established for long-term benefits to the ministries of the Parish, and for major capital improvements to Parish facilities.
  - Informing potential end-of-life donors of the Parish processes to facilitate and receive gifts and to ensure their use as directed by the donors. These may include but are not limited to one-time gifts, bequests, insurance benefits, and 401K distributions.
    - o The PGB assists with information concerning financial advisers and attorneys who may be of help to prospective donors.
    - o When appropriate and with sensitivity, the Board invites individuals to become members of the Legacy Society by pledging such gifts. The PGB facilitates Parish and Diocesan recognition, as desired.

The Board:

- Gives full effect to the standing Vestry Resolution Regarding Planned Giving and Disposition of Gifts to the Parish (Attachment 7)
- Coordinates with the Finance Commission as necessary to ensure effective and appropriate use of the resources under PGB control.