

LUSAKA CONFERENCE

WORLD DIVISION ANNUAL PLANNED GIVING & TRUST SERVICES REPORT

QUARTER ENDING: _____ DATE: _____

Name of Church/District: _____ Total No. Of Churches: _____

Total No. of Churches Reporting: _____ Total No. of Churches Not Reporting: _____

Total Persons: _____

Total FTE: _____

Number of Employees - _____

(Give Full Time Equivalent (FTE) for time spent working in Planned Giving Trust Services activity)

Planned Giving & Trust Services Department Cost for 2023 \$ _____

PLANNED GIVING OUTREACH ACTIVITIES FOR THE YEAR 2023

RELATIONSHIP BUILDING AND MAINTAINING ACTIVATES:

1. Number of planned giving presentations in churches? _____
 2. Number of planned giving presentations in other venues? _____
 3. Number of planned giving homes visits? _____
 4. Mailings to members and clients? _____
 5. Number of pieces mailed? _____
- (For example: birthday, anniversary, sympathy and get-well cards, etc.)

MARKETING - RELATIONSHIP SEEKING ACTIVITIES:

Website Statistics:

- Number of visits? _____
- Number of pages viewed? _____
- Number of local churches with websites? _____
- Total churches added in 2023? _____
- Total number of eNewsletter subscriptions? _____
- Number of new eNewsletter subscriptions added in 2023? _____
- Number of printed advertisements in 2023? _____
- In Union publications? _____
- In Conference Publications? _____
- Number of planned giving internet advertisements in 2023? _____
- Number of planned giving social media advertisements in 2023? _____
- Number of planned giving donor stories written in 2023? _____
- Number Planned Giving videos produced in 2023? _____

CHURCH PLANNED GIVING TRAINING SEMINARS:

Number of planned giving seminars conducted in 2023? _____

Number in attendance? _____

Number completing the planned giving course? _____

LEADERS PERSONAL ESTATE PLANS

How many of Trust Services personnel have current estate plans for their families? _____

A. TRUST/ANNUITY AGREEMENT TOTALS*(Net balances for each fund or account, as shown at end of 2023)*

	Number	Dollar Amount
Annuities	_____	\$ _____
Irrevocable Trusts	_____	\$ _____
Pooled Income Fund	_____	\$ _____
Revocable Trusts	_____	\$ _____
Self-Administered Trusts	_____	\$ _____
Total of All Agreements	_____	\$ _____

B. WILLSNumber **written** in 2023 _____

Total Number of Wills in File (original or copies) as of ---/---/2023: _____

*(This includes all Wills drafted by any attorney, where the original or its copy is in your Trust Services files.**This total includes all such Wills held, not just those written in 2023.)***C. MATURITIES, INCOME, AND SPECIAL GIFTS RECEIVED IN 2023**From Outright Gifts *(as a result of Planned Giving & Trust Services activity)*:

		Dollar Amount
	Cash	\$ _____
	Property	\$ _____
From Trusts		\$ _____
From Wills		\$ _____
Total Income and Maturities for the Lord's Work During 2023		\$ _____

NOTE:

Please report only amounts received to the church and its affiliated organizations (**not tithes and offerings** only amounts from Section C above).

This figure should also include known amounts that went directly to any SDA entity from independent sources. Assets received other than cash should be included at fair market value on date of delivery.

For the sake of uniformity, and the avoidance of duplication on this report, it is requested that the entity within the denomination that **generates or first receives the maturity, income, or special gift**, be the one to report the same, even though funds may be forwarded to other church entities. Therefore, do not report amounts received that would be duplication from other church entities.

Signed:

District/Church Pastor:

District/Church PGTS Leader