

REPORT TO THE ASSOCIATIONS
OFFICE OF STRATEGIC ENDOWED GIVING
BRENDA B. MCCOLLUM, J.D., DIRECTOR
FLORIDA BAPTIST CONVENTION
2010-2011

The purpose of this office is two-fold: to provide support and promotion to pastors and churches in encouraging gifts through Wills and Trusts and other planned gifts, and to build endowments for the mission and ministry of the Florida Baptist Convention.

Currently the Florida Baptist Convention has identified three areas to be endowed. They are:

- Cooperative Program
- Conference Center Endowment
- Florida Ministry Fund

The Office continues to promote giving to these endowments as well as to other Baptist ministries including the local church.

- Field Service – The Department conducted 30 estate planning seminars in churches and returned to 11 churches for individual appointments with those who desired to give 10% of their estate to a Baptist ministry. This resulted in 169 people giving a gift of at least 10% to a Baptist Ministry. The Department conducted 5 regional meetings for Business Administrators or Pastors and presented materials to be used in promoting gifts by Will or trust in their church.
- Document Preparation – The Director drafted 133 Wills and 14 Trusts which included a gift of at least 10% to a Baptist ministry. As part of the Estate Planning process, the Department also drafted 202 Durable Powers of Attorney and 202 Living Wills, 16 Amendments to Trusts, 5 Codicils to Wills and 37 Declarations Naming PreNeed Guardian, for a total of 609 documents drafted during this period.
- Ministries Benefited – The Ministries that will benefit from the Wills and Trusts drafted during this period are: Florida Baptist Convention (12 gifts), Cooperative Program Endowment of the Florida Baptist Convention (7 gifts), individual Churches (137 gifts), SBC ministries (23 gifts) and other Florida Baptist Ministries (28 gifts).
- There is over \$67M in the pipeline, just over \$3M from last year.
- Materials Preparation – The Department Director wrote and produced the articles “What am I Doing with My Stuff?” and “A Light at the end of the Tunnel or an Impending Train-Wreck.”
- Website – A web-based newsletter provides additional information on the website for charitable giving. The newsletter includes a calculator that allows a potential gift-maker to calculate the tax deductions available when making a gift. E-brochures may be requested dealing with a variety of estate planning topics.

Produced a video (available on the website) for use by churches to encourage young couples with children to plan, and older persons as well. Also includes testimonies from pastors about how planned giving has affected their church.

The website also includes an overview of resources available from this department, and articles the church can use, as well as the ability to make online gifts to one of the Convention’s endowment funds.

- Consultations – The Director continues to consult with individuals regarding estate and probate matters.

Anyone interested in making a gift, either outright or by Will or Trust, should contact this office.