# THE BRIDGE

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**From the Foundation**

## Gift Planning: From Weekly Offering to Lasting Legacy



This month, we're focusing on gift planning. These gifts represent a spiritual connection between our passions and our resources for the future. They offer an opportunity for us to take our place in the story of faith. Planned gifts, such as a bequest, a charitable gift annuity or a gift of stock, are often what allow a church to dream beyond this year's budget. They fund the new roof, sustain the food pantry and seed the ministries a congregation hasn't imagined yet.

There's good news. Americans gave $151.6 billion to faith communities in 2025, more than to any other kind of charity. Gifts through estates grew even faster, rising nearly 20% to $62.2 billion. And research shows that people who include a charity in their will don't give less along the way. On average, their annual giving rises by about 77%.

A Bank of America study released in September found that nearly half of younger wealthy donors already give through charitable trusts. Gift planning isn't just for the second half of life.

But there are dips we should be mindful of. Once inflation is factored in, giving to churches was essentially flat last year. Over the longer term, the share of American giving directed toward faith-based causes has fallen by more than half, from about 49% in the early 1990s to roughly 23% today. Those trends are a reminder that we can't take generosity for granted. Churches that invite members into gift planning now will be better prepared for whatever comes next.

In this issue, Gary Melville reflects on gift planning as a bridge between a donor's heart and the needs of others. You'll also find a simple tool to help members see what kind of gift might be possible for them.

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**Monthly Tip**

## Help Members See What's Possible

Most people don't need convincing to be generous. Their love for their church and its mission is rarely in doubt. What they often don't know is what they can afford to give, or how a planned gift might work for them.

Simple tools and clear guidance can close that gap. The Foundation's **Planned Gifts Calculator** lets members see how a gift such as a charitable gift annuity or trust could provide income, tax benefits and a lasting gift to the ministry. Share the link in your bulletin or stewardship materials, and invite questions.

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## Don't Miss Out!

If a friend or colleague forwarded this to you, we're glad you're here. **Subscribe to The Bridge so you never miss an issue.** Every month, we'll share news, stories and insights for churches and ministries across New England and New York, from stewardship ideas and investment updates to stories of generosity at work in our communities.

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## We Are Blessed: A Love Story, a Plan, and a Legacy



Their love first bloomed on a Massachusetts Army base in the 1960s. Decades later that love is still going strong, and it brought James and Edith Stephen to a question many faithful couples face: How do you take care of the person you love and still support the church that has shaped your life?

For the Stephens, who live in Ayer, just down the road from Fort Devens where it all began, the answer turned out to be a single plan that does both. As they like to say, "We are blessed."

Following a career in the Chicago Transit Authority, James went on to work as an IRS Revenue Agent, and Edith taught second grade for 15 years.

**Read More**

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## The Heart Behind Every Gift



**By Gary Melville**

Every church budget has a line for mission.

Behind those numbers are people: the family that finds a warm meal on a Tuesday night, the young person who spends a week at summer camp, the neighbor who experiences grace

through a congregation that kept its doors open. Something else important sits behind those line items: a gift someone planned years ago.

If you serve as a pastor, treasurer or finance committee member, much of your time goes to the numbers. That work matters. But the gifts that sustain a church across generations are rarely about numbers. They begin somewhere else.

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## Upcoming Events

The Foundation offers programs for church leaders, clergy, and laypeople alike. Visit **UMFNE.org** for more information about upcoming events, programs, and opportunities to connect.

- **Putting Your House in Order** – October 18 (Woburn, MA)
- **Office Hours with the Wesley Development Group** – October 20
- **Stewardship Preaching Institute Webinar featuring Bil Lepp** – November 4
- **Innovate, Integrate, Elevate Extended** – November 10–12

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