



**EPC**

Generosity Resources

RECOMMENDED LEGACY PLANNING PARTNERS

	Financial Planning Ministry	Orchard Alliance	PhilanthroCorp
<b>Description</b>	Non-profit Cooperative of Churches and Ministries	Turnkey but customizable planned giving program for churches and ministries	Serve hundreds of respected faith-based organizations and thousands of their supporters with gift and estate planning.
<b>Services provided</b>	Promote and conduct on-site stewardship seminars (minimum 2/yr.); on-site individual meetings; documents provided and maintained; or can refer to local church attorney or Christian Legal Society; regular gift report to the church. 30,000 families served.	Ministry Services Gift Planning Services; Gift Planning Marketing Support; Gift Planning Training; Will and Trust Planning ministry;	Will and estate planning services for members, customized to meet church's unique needs and opportunities. Common components: Marketing Support and materials, Reporting, Assistance for members with their legacy planning needs.
<b>Cost to the church</b>	Generally open-ended annual contribution; may rise over time based on volume.	Depends on which service level is provided: 1) basic gift planning and back-office marketing support; 2) enhanced gift planning training support	Monthly fee with 2-year commitment. Some churches may qualify for a sliding scale or "pay as you go" remote-only services.
<b>Cost to donor</b>	No out of pocket cost.	Gift and estate design service with fees dependent on simple, standard, or complex needs. Plus likely private local attorney fees.	Private local attorney fees. Or Philanthrocorp offers access to an attorney network arranged at much-discounted rates.
<b>Founded</b>	1982	1980	1997
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