Episcopal Parish Network
Where the Church Gathers

Summary and Transcript
A Season of Gratitude:
Weaving Planned Giving into Your Advent Stewardship
Originally presented December 3, 2025

Summary

The webinar, hosted by the Episcopal Parish Network (EPN) and featuring representatives from Vanco, focused on stewardship and planned giving during the Advent season. The session introduced strategies for integrating gratitude and legacy giving into parish life, announced Vanco's acquisition of ACS Technologies, and provided practical tools for parishes to strengthen their stewardship culture.

Key takeaways:

- **Advent as a foundation for stewardship**: The presenters emphasized that Advent is not just a countdown to Christmas but a spiritual season of reflection, gratitude, expectation, and preparation. These themes can naturally support stewardship and planned giving conversations.
- **Announcement of Vanco and ACS Technologies merger**: Vanco's faith and nonprofit division has acquired ACS Technologies as of December 1, forming "ACST powered by Vanco." This merger aims to enhance stewardship support and innovation for Episcopal parishes without changing existing tools.
- **Five-step framework for stewardship**: Vanco introduced a framework—Reflect, Recognize, Respond, Reimagine, Renew—to guide parishes from gratitude in the present to generosity for the future. Each step connects spiritual reflection with practical stewardship actions.

- **Integrating gratitude and legacy giving**: Parishes were encouraged to include gratitude moments in Advent communications, highlight legacy-funded ministries, and gently introduce planned giving as an act of thanksgiving and discipleship rather than a financial appeal.
- **Practical tools and resources**: Vanco will provide attendees with a planned giving starter checklist, Advent gratitude templates, messaging examples, and a holiday giving kit to help parishes implement these ideas immediately.
- **Q&A insights**: Participants discussed tracking legacy gifts, balancing annual and planned giving messaging, handling designated gifts, and integrating Vanco and ACS systems. The consensus was to maintain transparency, connect giving to mission storytelling, and tailor approaches to each parish's context.

Transcript

Joe Swimmer (EPN)

Alright, everybody. Welcome. Welcome to those who are joining us. We're giving it a second here for folks to come into the room. Excited to have you here today to talk about stewardship in the advent season, stewardship in the New Year.

Joe Swimmer (EPN)

We're thrilled to have our friends from Vanco with us to share a bit. Thank you for taking time out of a busy Wednesday in advent season to join us. I'm Joe Swimmer. I'm the executive director of Episcopal Parish Network. And as always, it's wonderful to welcome you to one of our webinars.

Joe Swimmer (EPN)

We have a few more webinars coming up this year. I hope that you will take a look at our website, episcopalparishes.org, to see about those. Sign up to our mailing list so you can find out what else is on tap. We'll have several in January and February right

before we join together for EPN 2026 in Charlotte, March. Early bird pricing for the 41st annual EPN is available at our website.

Joe Swimmer (EPN)

Please take a look at the agenda. Vanco will be with us, and we're thrilled as always to have them. I'm also excited that there might be some news that comes out of this webinar that will be mentioned here in a minute. But in the meantime, we are grateful for you, for our members of the network, for those who are partaking of these. If you are not a member and you'd like to learn more about membership, you support this work.

Joe Swimmer (EPN)

We appreciate that, and you can learn more at our website, abyssicalparishes.org. Again, thank you so much for joining us today. Thank you to Ali. Thank you to Jenny. Thank you to Vanco.

Joe Swimmer (EPN)

And with that, I'm gonna turn it over to Ali for a wonderful presentation and maybe some special news somewhere in there. Alright? Thanks so much, and, blessed Advent, everyone.

Alisia Williams

Thank you so much, Joe. We're very excited to be here. And I just wanna say welcome to everybody. We're grateful that you've taken time during, you know, what we know is an incredibly full season to be part of this session today. And so this webinar was really designed with one central idea or hope in mind, and that's really to help parishes ground their stewardship and their planned giving work in the heart of Advent, that spiritual heart of Advent.

Alisia Williams

And Advent is, you know, it's not simply the beginning of the liturgical year. It's really the church's annual invitation back into the themes that that we know shape Christian generosity and, you know, the promise that God is already doing something new, which is very exciting. And so today, we're gonna talk about how these advent themes can really help us build not just, you know, momentum for year end giving, but really a culture of gratitude and legacy that can strengthen a parish for generations. So, as soon as we get our slides up, we'll move forward. There we go.

Alisia Williams

Thank you so much. And, we'll go to the next slide, please. Alright. So, here's what we're focused on today. So first, we want to look at how to integrate gratitude into your advent and your year end messaging.

Alisia Williams

And we wanna do that in ways that feel, you know, really natural and pastoral and, you know, fully aligned with the Episcopal culture. And then next, we're gonna explore how to introduce planned giving as an act of thanksgiving and discipleship, you know, rather than a financial appeal or something that feels like a technical process. We know at Vanco that, you know, planned giving becomes accessible when you can frame it, as a spiritual practice. And then finally, we're gonna talk about what it looks like to help your parishioners really see their giving as part of a meaningful legacy, you know, legacy of love, of faith, and a mission ultimately that outlives them. And so, all of these strategies are designed to be very practical and gentle and something that you can use right away.

Alisia Williams

Next slide. So, we at Vanco, we've come to this work because, you know, we've seen firsthand Jenny and I have seen firsthand how thoughtful stewardship practice, right, how that really can transform a parish and not just financially, but spiritually. And so Jenny and I, during our time and our careers, we've worked with thousands of churches, navigating, you know, year end giving, things like legacy formation and, planned giving conversations. And more importantly, we've seen how gratitude centered stewardship can really strengthen ministries long term. So our goal today is not to give you, you know, a list of tasks.

Alisia Williams

It's really to help you rediscover stewardship, as a ministry of formation and a way to help people find joy in their giving. And so, to formally introduce myself, Amalia Williams. I'm the director of marketing for faith and nonprofit, here at Vanco, and I'm joined today by Jenny Lutter. She's our director of strategic partnerships. And I'm gonna turn it over to Jenny.

Alisia Williams

She has a welcome message and just a few words that she'd like to share. So we'll go to the next slide. We'll have Jenny jump in.

Jenny Lutter

Hi. Thank you so much for that great introduction. I'm Jenny Lutter, and I have the privilege of managing the relationship between Vanco and EPN. And I've been at the EPN conference, I believe, for the last five years since I started at Vanco, and I love being there. The values, the speakers, everything that is spoken about is so heartfelt, and beautiful as we think about the mission, to serve God's people.

Jenny Lutter

So I was looking at the scripture for this week. By the way, I am formerly a pastor, now serving the church in this way. I'm now married to a pastor. So ministry is deep in my life and has been a focus of my career. So I was reading the scripture for this Sunday, if you follow the RCL, and its Psalm 72 is one of those.

Jenny Lutter

And I just thought it was so beautiful. This focus, I highlighted it. I won't read the whole thing, but verse two, may he judge your people with righteousness and your poor with justice. May the mountains yield prosperity for the people and the hills in righteousness. May he defend the cause of the poor of the people and give deliverance to the needy.

Jenny Lutter

And, you know, the mission of the Episcopal Church is to restore all people to unity with God and each other in Christ. And when I think about that, think about that, you know, our gratitude for knowing that God loves us, that God provides for us. And for those who have extra, God calls us to help bring restoration, bring provision to those who are in need. And at this time of Advent, I mean, what a time to think about those who are suffering and those who don't have enough. So I just see that heart when I'm at EPN, very clearly, in who's there and what the speakers say.

Jenny Lutter

And I just think that's so beautiful. So as I think about that, I think about, you know, knowing that I am fully loved, knowing that God provides all the things in my life. I do have the spirit of gratitude, and I think that that's such a beautiful focus for this time in Advent. And out of that, I want to have generosity, and I wanna provide ways as I work in the church, for others to be able to give generously out of that joyful, gratitude. And for them to then ex you know, as that is played out on earth that are what how we've been provided for, we will extend that.

Jenny Lutter

And I think that as church leaders, that's something that we can help enable, for God's people. So, thank you for giving me a few minutes. I wish you a blessed advent and really am thankful that you are people who help keep the focus on this whole joyful time of really, really taking in what God has given us.

Alisia Williams

Thank you, Jenny. That was beautiful. We'll go to the next slide. Alright. And, as you've probably started to notice, and throughout our time today, you'll really see that it's apparent our approach here is ministry first.

Alisia Williams

And everything that we do, everything Jenny and I do and our and our team does, and everything that we teach is grounded in the shared commitment of wanting to resource the church with integrity, clarity, and compassion. And we spend a lot of time listening, you know, to clergy, to vestries, to finance committees, you know, talking with clients, with our product teams, and we wanna shape tools and technologies that will help solve your problems and your real challenges, you know, in your day to day parish life. And so at Venco, we've done that as a company for almost thirty years now, and we've been in the payment processing space. And I'd love to share some exciting news about the future of Vanco. And I'm really thrilled, and Jenny and I were talking about this before the session today.

Alisia Williams

Y'all are really the first to hear this, literally. So if you wanna go to the next slide. So as of this week, as of December 1, Vanco's Faith and Nonprofit Division has joined with ACS Technologies, and we are bringing together decades of stewardship, of giving, of ministry expertise, all under one name. So that will be ACST powered by Vanco. And

for Episcopal parishes, this matters because we know that ACST already serves half of the Episcopal Church.

Alisia Williams

And Vanco, we've been around as a trusted giving partner for, you know, almost thirty years. And bringing these teams together, it really makes long term stewardship support even stronger. And so we're just thrilled to announce this. Our partnership does not change tools. It does not change anything.

Alisia Williams

It simply expands the support behind them and the innovation that we're gonna be able to have. So we are excited to be united in service to you. So we will go to the next slide. And now let's turn our attention fully to Advent. So Advent, you know, it's not just a countdown to Christmas.

Alisia Williams

This is the liturgical season that prepares the heart, and we know that prepared hearts are generous hearts. And so when we connect the idea of stewardship to Advent spiritual themes, giving really becomes less about dollars and money and more about things like discipleship and gratitude and hope. And go to the next slide, please. So it is, you know, four major themes, reflection, gratitude, expectation, and preparation, and these come together, you know, for stewardship conversations that don't feel transactional or forced. And we know that, you know, this is a time to consider not only God's blessings, but our legacy of faith.

Alisia Williams

And so people are already thinking about things like blessing and legacy and meaning during this time, and they're reflecting on those who've shaped them. And

giving thanks for the, you know, the ministries that form their children and serve their community and, you know, really anchor their faith. And so this makes Advent an ideal moment to have, you know, know, those gentle pastoral conversations around planned giving. Next slide, please. And so at Vanco, we do a lot of research.

Alisia Williams

We released our church cover giving study that shows, you know, ten years of comprehensive data and insights on giving behaviors. And, you know, we see that research across denominations in general in The US, it shows that gratitude is the number one driver of sustained giving. And so it's not about urgency. It's not about obligation. It's not financial pressure.

Alisia Williams

It really comes down to gratitude and everything that comes with that. And we see that when churches and parishes, if they lift up gratitude consistently in their community and in their conversations, you know, parishioners feel connected. They feel inspired, and connection is that foundation of generosity. And so that's why when we're talking about planned giving, when we can ground that in gratitude, it really feels more like a gift and not a, you know, a financial ask. Next slide, please.

Alisia Williams

So let's talk about integrating gratitude into Advent and your messaging. And, you know, there are some practices that require really no additional effort, but these are small things that can make a really profound impact during this time. And that's things like having weekly gratitude moments, you know, in your bulletin or your announcements. You could have a testimony highlighting how, you know, parish ministry shapes someone's life. You could do a thank you note to the congregation, especially your volunteers.

Alisia Williams

You can do things like advent reflections that name blessings and hopes, and, you know, you can even do your end messages that, you know, celebrate what God has done. And so when you kind of lift up this idea of gratitude when you foster that, you know, you strengthen connection with your community. And as a natural result of that, you're going to see your stewardship get even deeper. Next slide, please. So how do we move from this idea of annual giving to legacy giving?

Alisia Williams

And so, we know parishes, they put a tremendous amount of energy into annual giving, which is very important. But we know that one of the greatest stewardship opportunities, it doesn't lie in the next year, but lies in the next generation. And so when we think about legacy giving, we think about, you know, asking that question, how will our gratitude today shape our parish tomorrow? And so when you frame that spiritually and not technically, planned giving becomes that natural extension of thanksgiving. Next slide, please.

Alisia Williams

So at Vanco, we've taken our insights, our data, everything we've learned, you know, over thirty years of doing this work, this really important work. And we've created a five step framework to make this shift very approachable. And so this framework can help you guide people from gratitude in the present to generosity for the future. And so those steps are: reflect, recognize, respond, reimagine, and renew. And these steps help parishes connect gratitude to both present giving and also that long term stewardship.

Alisia Williams

So, as we go through each one, reflect is about how to remember God's faithfulness. Recognize is celebrating generosity and ministry impact. Respond is encouraging that

intentional gratitude. Reimagine is then connecting that gratitude to long term stewardship. And then renew is inviting legacy that extends mission.

Alisia Williams

Next slide, please. So let's dive into step one, and let's go a little bit deeper. So reflect. So you want to invite your parish to look back at things like blessings and milestones and ministry moments and, you know, number of lives transformed. And because reflection really is that spiritual soil of gratitude and, you know, helping them look back on what has formed them, you know, things like the sacraments, the community, the milestones that have been celebrated.

Alisia Williams

This really quietly prepares people for deeper generosity. And so reflection leads to gratitude, and gratitude leads to generosity. And so these reflection moments can happen during things like Advent sermons, vestry meetings, or, you know, even within their individual spiritual practices. Next slide, please. So step two is recognize, and recognition is about naming the impact of generosity.

Alisia Williams

So that's about storytelling and celebrating the ministry sustained by, you know, past gifts or endowed funds and really lifting that up. Because when parishioners can see how that generosity shapes ministry, they feel part of that impact, and they begin to imagine how their own giving, you know, can do even more of the same. So if you're familiar with Vanco, we are really big on storytelling, and we really believe in the power of storytelling and the impact that that makes with generosity. Next slide, please. So step three is respond, and this is really encouraging gratitude in action.

Alisia Williams

So things like advent offerings, you're in thankfulness, you know, renewal of commitments. Really, the goal here isn't to pressure. It's to invite because responsibility flows naturally when that gratitude is alive. And it is about it being a spiritual practice and not a transaction that feels forced. Next slide, please.

Alisia Williams

So step four is to reimagine. So this is inviting your parishioners to look beyond the present moment. And this is where planned giving begins to really enter the conversation, and you can do it in a gentle and a pastoral way. So this could be legacy giving, bequests, memorial gifts, endowment support. You know, these are all ways that parishioners can help ensure the church's ministry, you know, continuing long into the future.

Alisia Williams

And what I do wanna say here is, you know, planned giving, it's not a replacement for annual giving, but it is a deeper expression of someone's values and faith. And so it really is that thanksgiving, that discipleship, and that hope. Next slide, please. So here we are at step five, and that is renew. And this is an invitation to people to consider their own legacy.

Alisia Williams

You know, many parishioners, they want their final act of giving to be one of love, you know, faith, gratitude. And it's this you know, the role here is really not selling planned giving. This is really to offer, you know, a pastoral pathway to express that legacy and asking you know, helping them ask the questions of, you know, what do I want my faith to make possible for the next generation? How can I ensure that my gratitude will endure beyond my lifetime? And so it's about sustaining that mission, you know, for decades beyond.

Alisia Williams

Next slide. So how do you introduce planned giving in ways that feel pastoral? We get this question from time to time, and we always say that you want to weave it in, you know, gently. You want it to be consistent, and you want it to align within the season. So not as a separate campaign, but really just a natural extension of of the advent themes. Next slide.

Alisia Williams

So we do have some practical messaging for advent, and these are things that you can use. And, we'll also be sharing some additional resources after this webinar that can also help you. So you wanna include a gratitude moment in each week of Advent, and the parishes that have started this have found this incredibly helpful. The other thing is you wanna highlight, you know, legacy funded ministry or a story. That's where, you know, the storytelling part really comes in, and that helps to, you know, show impact.

Alisia Williams

The other thing that you can do is you can add one or two sentences on planned giving to things like bulletin inserts and in other areas where you're communicating. And then think about incorporating planned giving in, you know, your sermons that you're doing on topics like hope and legacy and faithfulness. And, you know, with language, you can say something like a planned gift is a final expression of gratitude for God's blessings. Next slide. And we do have some sample parish messaging that we'll be sharing with you, and you can feel free to, to grab this template, and, you know, change it in the way that you need to.

Alisia Williams

You can adapt it for sermons and newsletters and bulletins and emails and things like that. We wanna make sure that the tone is always pastoral and never transactional. So

you could say something like, this advent, we give thanks not only for what God has done, but for what God will continue to do through our parish for generations to come. Including the church and your estate plans is a beautiful way to extend gratitude beyond your lifetime and strengthen our mission for the future. Next slide.

Alisia Williams

Thank you. And so here's some practical steps for vestries and stewardship committees. So where do you start? You know, we always suggest small manageable steps. So you can identify, you know, one story of ministry sustained by generosity.

Alisia Williams

You can, like I said, add a gratitude moment to each meeting and advent. You can also review your parish's planned giving language, and you can lift up one example of legacy giving, you know, in the parish's history and share that. Really, the goal is small steps to create comfort and familiar familiarity and, and really long term culture change. Next slide. So after this webinar, we're gonna share a lot of really helpful stuff with you.

Alisia Williams

You'll receive a set of free tools following our session today. So we have a whole kit that contains things like a planned giving starter checklist, some advent gratitude and communication templates, some mass messaging examples like the one I shared earlier. And we also have a holiday giving kit that we update every year, and you can adapt that in the way that feels natural for your parish. All of this is meant to lighten your workload and really to help you take immediate action. Next slide.

Alisia Williams

So in Vanco, we are so deeply thankful for our partnership with EPN. And through this collaboration, you know, we've ensured that Episcopal parishes like yours have access to things like extra discounted payment processing rates, digital giving tools, really tailored for you. And we also have a full support team, you know, that understands ministry. And now that we're with the team at ACST, we're even more excited to help your parish and to help you steward generosity well, you know, not only today, but for decades to come. So if you are interested in getting started with us or having a conversation, we do have that contact information here, and you can visit us at vancopayments.com.

Alisia Williams

But, again, we're so thankful for our partnership with you, and we really value that. Next slide. So, a final thought. As we move towards admin, let's remember that gratitude is the foundation of stewardship, and legacy is the fruit. And so, on behalf of Jenny and the team at Vanco and ACST, thank you for the ministry that you lead and and the hope that you inspire in our communities, and we're so proud and grateful to be a part of that.

Alisia Williams

And so that wraps up our portion of today's session. We are available if we wanna do q and a. I don't know if Joe wants to do that, but we're happy to answer any questions that you might have. So

Laura Manley (EPN)

Thank you so much for that, Ali. I appreciate it. And we did get a few questions in the chat, so I will read those for you and let you know what we've got coming. Hold on. Let me move it so I don't look like I'm looking at my wall when I read them.

Laura Manley (EPN)

So, the first question we have is from Steve Packard, and his question is, do you recommend that parishes track legacy gifts, for example, if they are given advanced notice that a future gift is coming? And what do they do with that information once they have it?

Alisia Williams

Yes. I think that's great. I know that, we definitely recommend that. I think it's always helpful to have that data and those insights. You know, really having that picture, having that information, it just really helps kind of reinforce the generosity and the activity within your parish, and it enables you to communicate in a stronger way, you know, to be able to say, you know, because of your support, we're able to do this or plan for this.

Alisia Williams

And I know Jenny with a lot of conversations, Jenny, I don't know if you had any thoughts you wanted to add to that question or not. Feel free to jump in.

Jenny Lutter

Mhmm. Yeah. Yeah. I appreciate the question. We've talked a lot about, you know, pledging and how to increase those capabilities so that you can see not only scheduled gifts, but also promised gifts.

Jenny Lutter

And so I really appreciate you bringing that up because it's been a big topic at Vanco. And now with, obviously, us joining with ACST and having that software behind it, our capabilities in this are gonna increase more and more. So, yes, track it because sometimes people need reminders, and our ability to automate that for you or make a system for you will only increase in the next year.

Laura Manley (EPN)

Thank you. Right. And then we have another question from Robert Clark. He has said there're some, two challenges that he's found with planned giving during Advent. So the first is they're still working to bring in annual giving pledges to finalize the budget for 2026, and Advent's already full of messaging on the coming birth of Christ.

Laura Manley (EPN)

So do you have any suggestions on how to squeeze in the planned giving without stepping on the other two?

Alisia Williams

Yes. That is a great question. So I can touch on squeezing in the planned giving? You know, I would just really look at, you know, every parish is different, and every church is different sort of in how they handle their comms. Depending on how many channels you're active in, I would look at where is there an easy lift.

Alisia Williams

Right? Where is that through email? If you're active on social, you know, where are those sort of easy ways that you can just kind of slip it in, in addition to, like, the more formal ways. Right? Jenny, did you have any thoughts as well on any of those?

Jenny Lutter

Yes. I would say keep it connected. I think we have a hard time asking for gifts. Right? Asking for more donations.

Jenny Lutter

But this is a time where we really talk about, but kind of what I was talking about before. Like, the needs of people in the community are at the heart of what we wanna do. And so when you talk about the birth of Christ, the message of Christ, the mission of Christ, it's a natural extension. So I would incorporate it because, otherwise, I think we tend to, like, fear that we're just asking for more money. But when you could connect it to the mission, the heart of what we're doing, which is very much related to Advent.

Jenny Lutter

It's very integral. I think that's what I would do. Just make an extension. Include it with it.

Laura Manley (EPN)

Very good. Thank you. Alright. And, Steve has another question, which is, do you recommend legacy gifts be accounted for as endowments, or are they to be spent as needed?

Alisia Williams

Well, that's a good question. I know in conversations with parishes, I've heard of it going either way. I think that's a preference. And, Jenny, you've probably had more conversations than I have on that, but I have heard of its kind of preference whether or not they want it to be, you know, for immediate needs or for an endowment. It really depends on the specific needs of that parish.

Alisia Williams

Jenny, what are your thoughts on that?

Jenny Lutter

Yeah. Honestly, I feel like that is a case by case.

Alisia Williams

Yeah.

Jenny Lutter

You know, how big that endowment is, how big the needs are, what's kind of the spirit or thought philosophy behind that endowment. Yeah. I'm sorry. I wish I had, like, a more concrete answer, but I just have seen both. And so, really, what's right for your parish is probably best.

Laura Manley (EPN)

Yeah. Alright. And I always say this gentleman's name wrong, but I see that he has his hand raised. And he has done workshops with us in the past, Charles Cloughen. I wanna say it, but it might be Cloughn.

Laura Manley (EPN)

Yeah. I think it's Cloughen. And I always mess it up. And Charles gives some very good advice, and I will also share a link to the workshop that he did on how to do, you know, planned giving and how to handle if people wanna designate it for a specific thing, you know, if they're leaving a legacy gift, that type of thing. So he has some very good philosophies about that.

Laura Manley (EPN)

So, and if you're and I just saw someone else raise their hand. If you could type things in the chat because that's the only way that I can read your questions. So I'm, like, kind of I know Charles, so I'm kinda trying to read his mind. But if you have a question, put it in the chat, and I will make sure that I get it asked. So I can. Go ahead..

Jenny Lutter

I just want to say I could address the comment about the designated giving. Yeah. I know. As someone who has worked, you know, managing church budgets, what you really want is money in the general giving budget, right, because there's the flexibility. We do the storytelling because people who are more moved tend to be more generous when it's connected to something where they can see the actual mission.

Jenny Lutter

So if you can break it up into a story and show that on your giving page, I recommend that, understanding that you need to, you know, limit that, and really watch to make sure general giving is still what it needs to be. But we understand that challenge. But when you can just tell the story and, you know, you can tell stories about your general giving. There are stories there. It isn't all about electricity and, you know, keeping the gas bill paid even I mean, I know that that's not as exciting to hear about, but there are things that that, you know, pull those stories out of your general giving and include that in the story, you know, verbally within your church service, but also on your giving page.

Jenny Lutter

I think that that is the real challenge there, but we understand. But we know that people more and more want to give to something that's really tangible, and they can see what difference is being made.

Alisia Williams

Yeah. And our latest study that combines a decade of data with new insights is showing that trend of younger parishioners, younger church attendees, Gen Z for instance. They very much want to be deeply connected to whatever it is that they're giving towards. They wanna know the impact that they're making. And, you know, depending on the demographics of your parish, that's something to consider, you know, if you have a younger base as well.

Alisia Williams

But as like what Jenny said, regardless, right, finding a way to connect even if it is about, hey. We need to keep the lights on. You know? Finding a way to sort of shape storytelling, you know, with that, I think, can be powerful. Right?

Alisia Williams

Because, truly, you can't function if you don't have, you know, if your doors aren't open and the lights aren't on and you don't have that that, you know, that that place. So, just sort of frame it, you know, that way, something to consider.

Laura Manley (EPN)

Yeah. Alright. And then from Robert Quinn, we have quite a few. So, Rick, I see that you have a question here. I'll get to it.

Laura Manley (EPN)

Robert Quinn, he asked, would you like to start a plan they would like to start a plan giving program. Excuse me. And they'd like to get information and or talk with someone at Vanco. So how do they contact you about getting that set up?

Alisia Williams

Yeah. You're welcome to, you know, go to vancopayments.com, like, right on our website. You could hop on there, and we do have, like, a chat, that's right there. You can immediately chat with someone, or you can, you know, submit. We have a request for a demo form.

Alisia Williams

You submit that. We'll have someone get right back to you. And if you do give us a call, you will reach someone within fifteen seconds. Like, I'm not even kidding. We are right there.

Alisia Williams

We have plenty of people to support you and answer questions. So we look forward to talking to you.

Laura Manley (EPN)

Nice. Very good. Alright. I did put a link to the website in the chat, and I'll make sure you all get one too. It'll be included with the resources too.

Laura Manley (EPN)

So alright. So once you set the tone of generosity and planned giving, how detailed should you get with parishioners to explain how they can give, or do you just pass them to a financial or a tax expert? How do you handle all that?

Alisia Williams

Ah, yeah. Yeah. Well, it depends on, you know, what you're offering. Right? If you are obviously doing something like stock or crypto, things like that Mhmm.

Alisia Williams

You know, there's some additional, like, layers to that. But in general, I would say make it very transparent. These are the five ways that you can give. Here's a QR code. Here's the link.

Alisia Williams

Here's exactly what you need to do, and making sure that you put that everywhere. So all of your channels, however you're communicating, email, social, your bulletins, printed materials, You could even have, you know, some parishes will even have a QR code, you know, on the back of their pews or on posters. You know? Don't be afraid to make it quick and easy so they know exactly what to do, and they can take that next step. Because truly, if they are in sort of the moment and they feel moved and they wanna give and they feel that, make it very easy for them.

Alisia Williams

And and, you know, Jenny had touched on the point earlier that sometimes it can feel maybe a little bit awkward or uncomfortable to sort of talk about giving and having that conversation, but that, again, is where we we really believe in the storytelling and helping them see exactly how they can be part of something bigger. And that completely transforms the experience for someone versus just being asked to give money. You know? And then it feels good. So

Laura Manley (EPN)

Yeah. Yeah. Alright. So Elizabeth has a couple comments here. She said that she wanted to share that the Episcopal Church Foundation also had some information about legacy giving that they found helpful.

Laura Manley (EPN)

So, yeah, definitely check out Episcopal Church Foundation. They do have some great information. And if you look in our Stewardship and Endowments sections on our Webinar Library, you'll see some other great resources there too. So there's a lot. And you can always contact us if you're looking for something specific.

Laura Manley (EPN)

And then she also says that they found that using legacy giving for operating expenses can often hurt stewardship. So do you have any insights on that or anything you wanted to say related to that?

Alisia Williams

Jenny, what do you think about this?

Jenny Lutter

I think it gets right to the storytelling theme that we've been talking about. If you're not telling the story of those legacy gifts, then people you're gonna have that negative reaction. Like, there's so there's expectation, right, with those legacy gifts, and they want someone to give it with a lot of meaning, a lot of heart, and they wanna see that connected. So how can you tell that story? And maybe operations, maybe we gotta think about how do we tell the story of operations.

Jenny Lutter

But we use operations in something else as well. Of course, operation I mean, everything is getting more expensive. Like, all the bills are rising for homes and for churches. So, it's very needed. I could see where you need to use those legacy gifts for that.

Jenny Lutter

So, again, push on that story. What can you say about why it's important? What are our church building operations and how does that serve the community? Who's been welcomed in? What meal have we served?

Jenny Lutter

What have we done? Exactly. You know, tie it to the mission as much as you can versus we paid an electricity bill. Okay. Why do we pay an electricity bill?

Jenny Lutter

What does electricity in this building provide?

Alisia Williams

Yeah. So it's really just going deeper.

Laura Manley (EPN)

Yeah. Mhmm. Exactly. Yeah. And Mark has a very Vanco specific question.

Laura Manley (EPN)

So they're currently set up at his parish to accept online donations through ACS. So how do qualified charitable distribution and donor advised funds interface with the Vanco and ACS Technology?

Alisia Williams

That's a great question.

Jenny Lutter

Yeah. I don't know about donor advised funds.

Alisia Williams

Yeah.

Jenny Lutter

But I do know that connection. If you're using ACST and you are using Vanco, too, it's all connected. And so you're reporting it's all integrated. It's like, we've already been operating as one solution in that way. So anything that you give through Vanco is gonna show up in your ACST reporting, and that's only gonna improve, obviously, because of the news today.

Jenny Lutter

I hope I've answered that question. I don't know much about donor advised funds. I don't know that that operates any differently, but we'll see what we can find out. Or if you can explain it a little bit more, we'll see what we can answer.

Alisia Williams

Yep. Yep. And sort of as we move forward from this week, we will make sure that we are pushing out, you know, very clear communications around next steps, what this

means for you. If you need to do anything on your end, our goal with this is really simple. We wanna make this a very smooth Yeah.

Alisia Williams

You know, movement forward. And if anything, it'll make everything easier for people. So yeah. And if you still have questions around donor advised funds, you know, feel free to reach out to either side. We're happy to, you know, answer more specific questions for you.

Laura Manley (EPN)

Nice. And someone wanted to know, is there a phone number they can call where they can actually, you know, talk to a person?

Jenny Lutter

I'll put it in the chat. Okay. Yes.

Alisia Williams

Yep. Jen will put it in the chat. It's (866) 755-9458.

Laura Manley (EPN)

There you go.

Jenny Lutter

So if you are new to Vanco, you'll see a sales number. If you are a current customer, you'll see a support number, and I'll put that in the chat. I think Ali just actually said a different number. We have multiple numbers. But so any will get you there.

Jenny Lutter

It'll get you there, but I'm gonna post both. Right?

Alisia Williams

That's awesome.

Laura Manley (EPN)

And they also posted a link which we'll share to their library of resources, so that's fantastic. And that Exactly. Yeah. And she said that that should address questions. But if not, give them a call or check out their website and send her an email. I can personally attest that I've worked with Jenny for about a year and a half now, I think, and they are very attentive over at Vanco. I love working with Vanco. So, Thank you. Yeah.

Laura Manley (EPN)

I was very excited about the announcement today because I was like, yay. I like working with Vanco. And if that customer service is going through the ACST Vanco partnership, that's fantastic. I love that.

Jenny Lutter

Mhmm. Thank you. We appreciate that. We love your partnership too.

Laura Manley (EPN)

Thank you. Yeah. And you guys are great to work with. So alright. Does anyone else, I think I got all the questions that were in the chat.

Laura Manley (EPN)

If there's anything else, please feel free to comment or ask a question in the chat. I'm just scrolling through real quick to make sure I didn't miss anything. So someone did ask about getting slides and a recording. Yes. You will get a copy of the slides.

Laura Manley (EPN)

You'll get a copy of the links and other resources, and a copy of the recording. It takes me, I'm the one who has to edit everything and put it all together. It takes me about a day or two to make sure it gets all together. As everything gets edited, we have to, you know, put some information in there. So, it'll be up on the website in a day or two, so keep an eye on your inbox.

Laura Manley (EPN)

Since you all registered, you will get an email when all that posting is available. So Wonderful. Yeah. Very good.

Jenny Lutter

Thank you, everyone. This has been great.

Alisia Williams

Thank you, everyone. Yes.

Laura Manley (EPN)

Thank you all for your time. I really appreciate it. We're so thankful to have you as partners. Thank you for sharing your wonderful news with us today. I really appreciate that.

Laura Manley (EPN)

I'm so excited. When we found out yesterday that there was gonna be some type of news, I was like, oh, what's the news? I have to know. So I'm very excited. So great.

Laura Manley (EPN)

Well, thank you all, Ali and Jenny, for your time and your expertise. Thank you to everyone who came today. I really appreciate it. So, thank you for taking the time to be with us today. Please feel free to share the recording and materials and information you've gotten.

Laura Manley (EPN)

When you get that email, forward it to anyone and everyone. We want to make sure that the church is informed and they're getting this wonderful material that can help help whoever they are in their ministry. So thank you so much. Right. Thank you all.

Jenny Lutter

Yep. Have a great day.

Alisia Williams

You too. Everyone.