THE FOCUS GROUP
SYMPOSIUM

Asset Giving University

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Help your donors tap into resources they didn't know they had to fund ministry.

CLOSING THE GAP BETWEEN KNOWING AND DOING IN MAJOR GIFTS FUNDRAISING

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Meet the Apostle Paul, Major Gifts Officer

Session 2

Lectio Divina

Command those who are rich in this present world not to be arrogant nor to put their hope in wealth, which is so uncertain, but to put their hope in God, who richly provides us with everything for our enjoyment. Command them to do good, to be rich in good deeds, and to be generous and willing to share. In this way they will lay up treasure for themselves as a firm foundation for the coming age, so that they may take hold of the life that is truly life.

- 1 Timothy 6:17-19

The Opportunity of a Generation

Session 3

The Great Wealth Transfer

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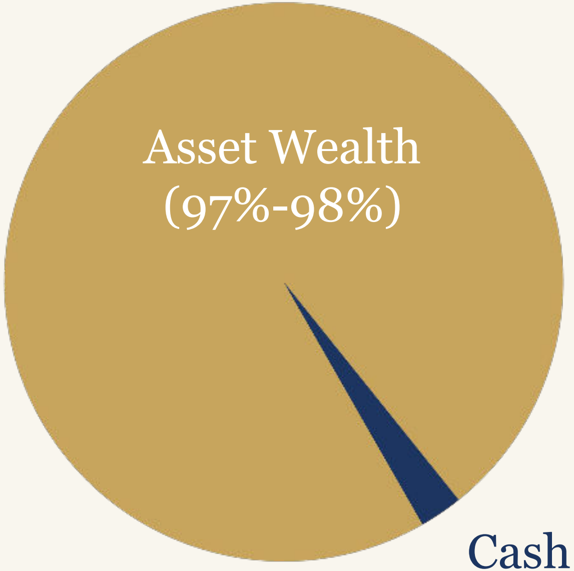
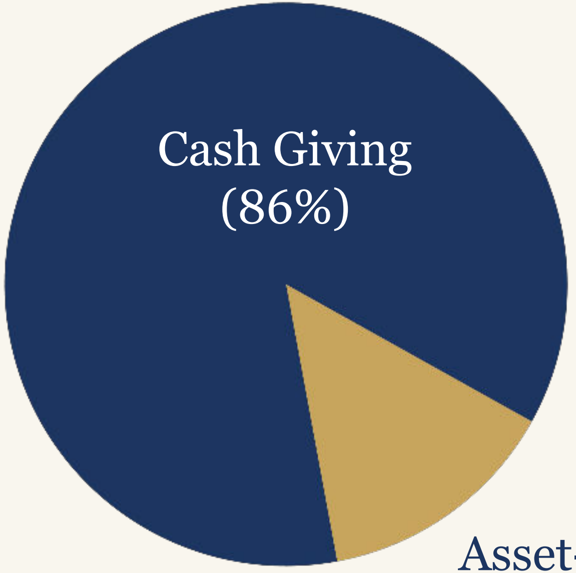
$120+ TRILLION

Why We Get Small Gifts

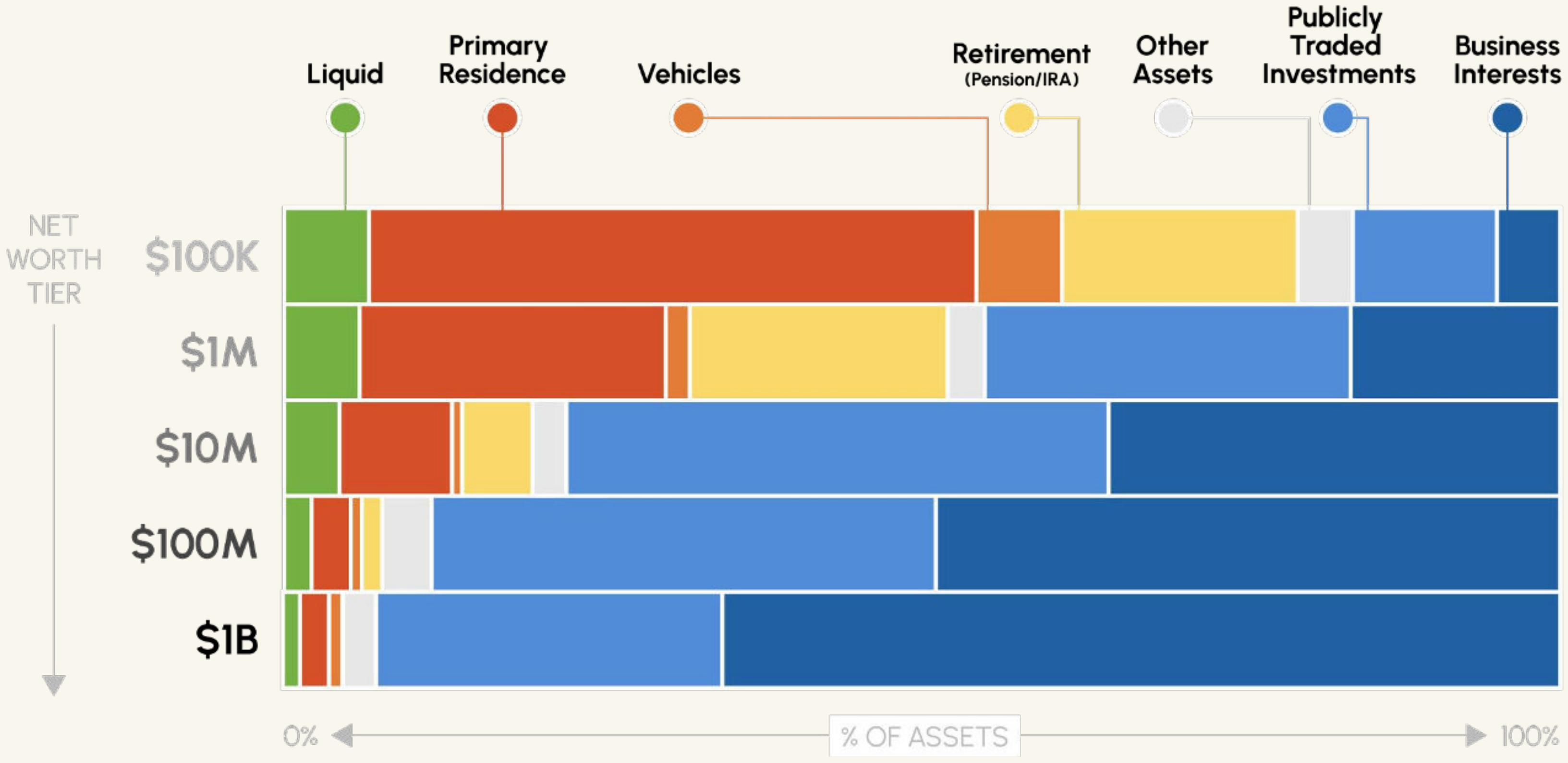
Where Wealth is Held



What is Donated



Where Assets are Held



Average Nonprofit Growth Rates

11% Growth	66% Growth
Nonprofits receiving only cash donations	Nonprofits receiving securities and other asset donations

Assets Make Gifts "Cheaper"

Give a dollar after death and **charity gets a dollar.**

Give a dollar of cash during life and **charity gets $1.50**, assuming you give your tax savings. You get a deduction and you have more to give to charity.

Give a dollar of an appreciated asset during life and **charity gets $3 to $5!**

What's in Your Wallet?

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Group 1	Group 2
What's in your purse or wallet?	Do you own stocks & bonds?
	36% More Purchased

Assets Make us “Feel” Wealthy

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The strongest predictor of a donation amount was subjective feelings about one's wealth, not its objective accuracy.

Asset Gifts are Tax Efficient

1. Charitable income tax deduction for the giver
2. Tax on future income reduced or avoided
3. Tax on future asset sale reduced or avoided

What are we actually receiving?

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3%

What are we actually receiving?

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.3%

What are we actually receiving?

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.03%

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Rethinking How You Show Up in Giver Meetings

Session 4

Every Story has Four Characters

Which One Are You?

Showing Up in My True Identity

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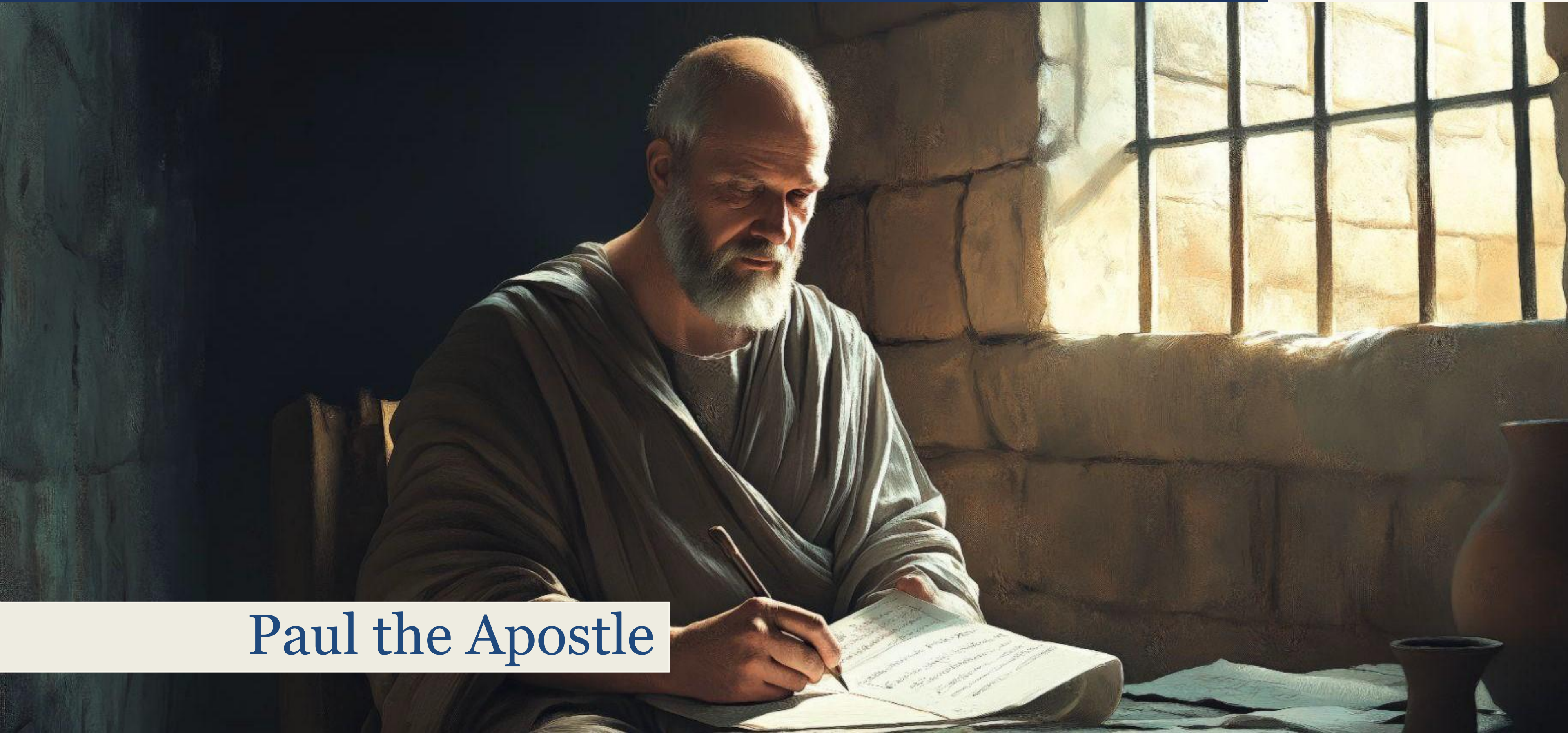
1. Your identity is NOT your role(s)
2. Your identity is God's gift of you to the world
3. What would you still do if you didn't get paid for it?

Joseph, the Patriarch

Calling Out the Identity of Others



Paul the Apostle

Help Others Think

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Can I step out of fundraising mode to help someone hear from the Lord?

Confidence and Curiosity

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Deep Listening Practicum

Session 5

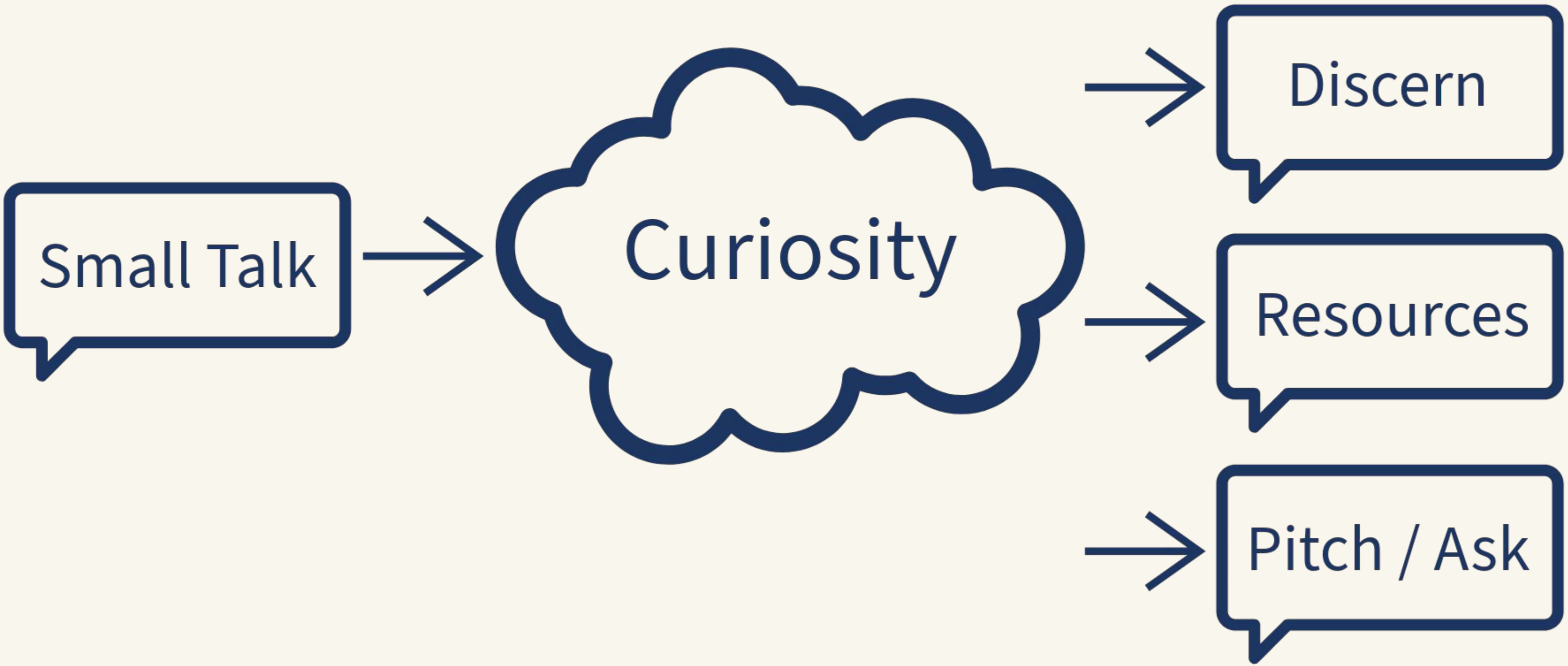
“Fundraising” Conversations

Small Talk → Priming → Pitch → Ask

Priming: Why does this person give to us?

Pitch: Frame my pitch in terms they connect with.

Better Conversations



Engineering Better Questions

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Defending a broad opinion or policy (Argument/Debate)

→

Explaining a personal journey, motivation, or emotional impact (Connection/Understanding)

Here is an Example:

OK: What do you think about ?

Better: How did you come to believe that about ?

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The Pastoral Interview

Session 6

Coming Up…

1. A simple method for going deeper with a giver in a first meeting.
2. Practical, non-threatening ways you can learn about the asset wealth of a giver.

The Five BIG Questions

1. What are you looking forward to?
2. What's the “Dream”?
3. How is business?
4. Talk to me about family.
5. What is your sense of your Kingdom mission in this season of your life?

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Making Qualified Charitable Distributions (QCDs)

Session 8

QCDs: The Big Idea

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10,000 people turn 70 every day between 2011 and 2030

You Need a QCD Strategy!

Business Gift Illustration

	Family	Taxes	Charity
No charitable gift	$10,064,000	$5,936,000	$0
Sell first, then give cash	$9,561,000	$5,433,000	$1,006,000
Give first, then sell	$9,738,000	$4,662,000	$1,600,000
	$177,000	($771,000)	$594,000

- $16,000,000 Fair Market Value
- $0 Cost Basis
- 50.00% Ordinary Income Rate
- 33.3% Capital Gains Rate
- 3.80% Medicare Surcharge
- 15% Valuation Discount
- $0 Debt
- 100% Gift

Onramps to Asset Conversations

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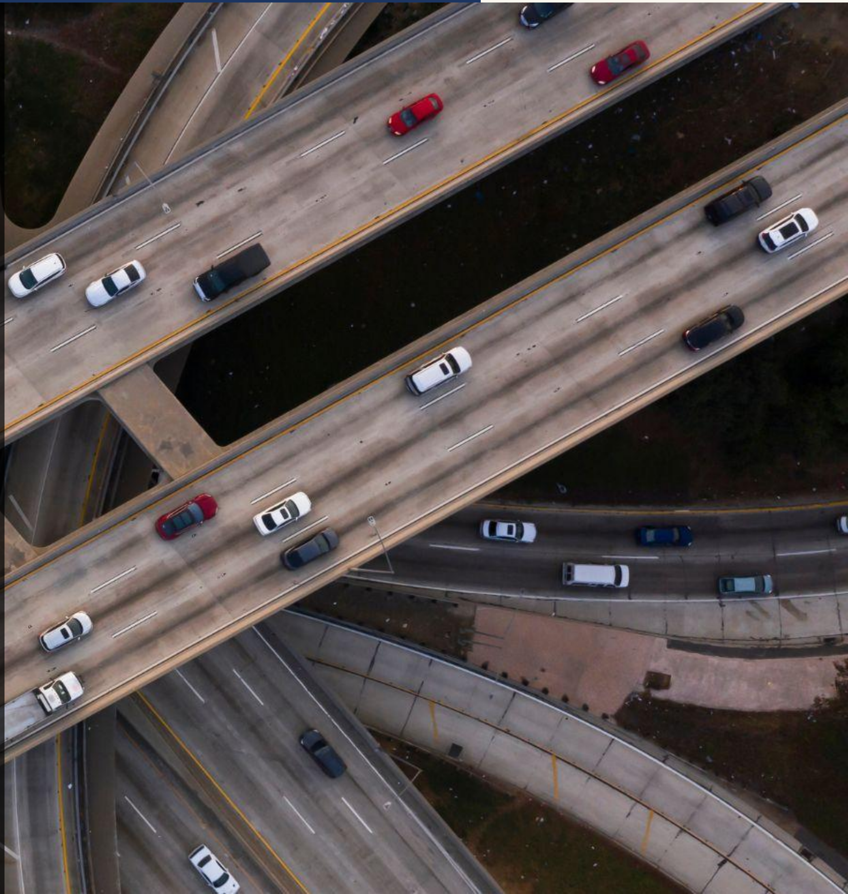
1. We just made a large cash gift
2. We just made a pledge
3. I'm retiring soon
4. An invite to a President's Event
5. I'm selling it
6. I just sold it
7. I'm getting a bunch of cash
8. We're updating our estate
9. We'd give more, but…(taxes)



Join us for AGU Fundamentals in 2026!

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SAN DIEGO FEBRUARY 24-26


BAY AREA MARCH 10-12


GREATER LA APRIL 14-16


ORANGE COUNTY APRIL 21-23


INDIANAPOLIS JUNE 23-25

Questions?

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