

**North American Division**  
**Planned Giving & Trust Services**  
**2023 Annual Report**  
*Due at The General Conference March 8, 2024*

ORGANIZATION NAME: \_\_\_\_\_

TOTAL NUMBER PGTS EMPLOYEES: \_\_\_\_\_ Total FTE: \_\_\_\_\_  
*(Full Time Equivalent for time spent working on Planned Giving Trust Services activities)*

PGTS DEPARTMENT COST LAST YEAR \$ \_\_\_\_\_

PLANNED GIVING DEVELOPMENT ACTIVITIES

A. Planned Giving Presentations:

1. In Churches \_\_\_\_\_
2. Other Venues \_\_\_\_\_
3. Other Venues Description \_\_\_\_\_  
\_\_\_\_\_

B. New Donor Visits \_\_\_\_\_

C. Donor Stewardship Visits \_\_\_\_\_

PLANNED GIVING MARKETING ACTIVITIES

A. Mass-Mailings # of Mailings Recipients per Mailing

1. Postal Mailing \_\_\_\_\_

2. Emailing \_\_\_\_\_

B. Annual Website Visits \_\_\_\_\_

C. Advertisement Channels

1. Magazine Advertisements \_\_\_\_\_

2. Internet Advertisements \_\_\_\_\_

3. Social Media Advertisements \_\_\_\_\_

4. Other Channels \_\_\_\_\_  
\_\_\_\_\_

D. Advertisement Content Created

1. Donor Stories Written \_\_\_\_\_

2. Videos Produced \_\_\_\_\_

3. Other Marketing \_\_\_\_\_  
\_\_\_\_\_

TRUST SERVICES

A. WILLS, TRUSTS & ANNUITY AGREEMENT TOTALS

(Net balances for each fund or account, as shown at end of last year)

	<u>New #</u>	<u>New Dollars</u>	<u>Total #</u> <small>(New &amp; old)</small>	<u>Total Dollars</u>
1. Wills	_____	N/A	_____	N/A
2. Trustee Revocable Trusts	_____	\$ _____	_____	\$ _____
3. Irrevocable Trusts	_____	\$ _____	_____	\$ _____
4. C.R.T.s	_____	\$ _____	_____	\$ _____
5. Charitable Gift Annuities	_____	\$ _____	_____	\$ _____
6. Self-Administered Trusts	_____	\$ _____	_____	\$ _____
7. Other Agreements	_____	\$ _____	_____	\$ _____
<b>8. Total All Agreements</b>	_____	\$ _____	_____	\$ _____

B. MATURITIES, INCOME, AND SPECIAL GIFTS *(see note below)*

	<u>Dollar Amount</u>
1. Trusts	\$ _____
2. Wills	\$ _____
3. Charitable Gift Annuities	\$ _____
4. Outright Gifts (resulting from PGTS activity)	\$ _____
5. Beneficiary Designations (POD bank account, IRA, life insurance, brokerage account etc.)	\$ _____
6. Other:	\$ _____
<b>7. Total Income and Maturities for the Lord's Work Last Year</b>	<b>\$ _____</b>

C. PROJECTS UNDER MANAGEMENT OVER \$1 MILLION

(Trusts/Estates/Gifts)

	<u>Dollar Amount</u>
1. _____	\$ _____
2. _____	\$ _____
3. _____	\$ _____
4. _____	\$ _____
5. _____	\$ _____

NOTE:

C. Maturities, Income, and Special Gifts: Report only amounts received by or distributed to the church and its affiliated organizations.

Do not report amounts your organization receives from other church entities.

Include amounts your organization receives from non-SDA church entities such as private Trustee, Estate, attorney, bank or trust company.

Include assets received other than cash at fair market value on date of delivery.

D. Projects Under Management Over \$1MM: ARM needs this information for insurance purposes. Identify each project by number and project type (e.g. CRT101) no names.

*Union Conference: Please attach a copy of each conference/organization report to union combined report.*