

# PLANNED GIVING & TRUST SERVICES



**Audrey Folkenberg**

Stewardship | Planned Giving & Trust Services  
Director



**April Montoya-Gonzalez**

Stewardship | Planned Giving & Trust Services  
Assistant Director



**Elizabeth Seymour**

Planned Giving & Trust Services  
Accountant

## MISSION

The Planned Giving & Trust Services (PGTS) Department exists to encourage, inform, and serve the Southern New England Conference members in creating wills, trusts, charitable gift annuities, and other current and future gift options that support the Southern New England Conference ministries.

## FAST FACTS

Matured wills and trusts, gifts of stocks, charitable gift annuities, and cash helped support Camp Winnekeag, churches, and evangelism.

Gifts were received from in and out-of-conference church members. Some donors did not have a file in our office, so their gifts were unexpected blessings.

We are developing a relationship with Western Adventist Foundation ([wafsda.org](http://wafsda.org)). This organization specializes in trust management, investment, CGAs, etc. They serve conferences, unions, and ministries across the NAD, provide our team with valuable support, and serve as fiduciaries for members needing such.

## SUMMARY

2024 has been a year of reviewing, updating, and restructuring. Updating files has reconnected us with clients committed to supporting God's mission in our conference. We have continued to educate and inform members of the importance of estate planning and its blessings to family and God's mission.

## ACCOMPLISHMENTS

After completing research and a presentation to the Association Board (AB),

- AB voted for approval to utilize an electronic database storage system.
- After completing research and presenting it to the AB, approval was given to change services from Planned Giving & Trust Services to Planned Giving Plus.
- Developed and implemented a new PGTS Website ([Sneclgacy.org](http://Sneclgacy.org)).
- Initiated a monthly e-newsletter. # of recipients: 1061
- Drafting of Gift Acceptance Policy prepared for AB approval.
- Annual Senior Appreciation meal, with guest speaker David Trim, PHD, GC Archives and Statistics. # of guests: 150

## FUTURE OPPORTUNITIES

- Transfer of data to Trust Database the final stage of restructuring.
- More time will be allocated to informing and inviting members to support God's mission through present and future giving as we aim to build our clientele.