

The Church and Financial Literacy

Is Your Congregation Financially Well?

*“Plans fail for lack of counsel, but
with many advisers they succeed.”*

Proverbs 15:22 NIV



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Why Financial Literacy Matters



Proverbs

13:22

*"A good person
leaves
an inheritance for their
children's children."*

(NIV)

60%

have no will
or estate plan¹

\$124T

Great Wealth
Transfer
underway now²

Sources: 1. Caring.com Wills & Estate Planning Study, 2024 2. Cerulli Associates, U.S. HNW Markets Report, 2024

The Church's Role in Financial Wellness

The church has always been more than a place of worship



- ✓ Trusted voice on stewardship and giving
- ✓ Safe space to talk about money and legacy
- ✓ Educational seminars on estate planning
- ✓ Bridge to generational wealth building

What Pastors Can Do



- 01** | Preach on stewardship — beyond tithes and offerings
- 02** | Host a Financial Wellness Sunday / workshop
- 03** | Encourage members to create a will / estate plan
- 04** | Partner with trusted advisors to provide estate planning information to your congregation

Estate Planning: Do Your Members Have a Plan?

*A will is an act of love.
It is also an act of faith.*



Will / Trust

Directs your assets to those you love

Healthcare Directive

Speaks for you when you cannot

Beneficiary Designations

IRA, life insurance, retirement accounts

Charitable Bequest

Your legacy gift to the church and Kingdom

Honoring Your Cheerful Givers

“God loves a cheerful giver.”
— 2 Corinthians 9:7



RECOGNIZE

Create a Legacy
Society
to honor planned
gift donors

CELEBRATE

Annual
stewardship events
and personal
thank-yous

GROW

Build a year-round
culture
of generosity —
not obligation

7 Steps to Start Your Planned Giving Program

- 1 Ensure church legal & tax compliance
- 2 Form a planned giving team
- 3 Establish a Gift Acceptance Policy
- 4 Educate your congregation
- 5 Promote wills, bequests & stewardship
- 6 Recognize donors — create a Legacy Society

7 Start today. Repeat steps 1–6



Meet the Founder



Aquanetta Betts, JD

Founder & Principal, Johnson Betts, LLC, Philanthropic Consultant

Estate planning attorney — 20+ years

Raised over \$100 million in charitable gifts

National leader in faith-based planned giving

Grateful Faithful

**Build Legacies
Empower Generosity
Sustain Ministries**



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Consult with an attorney about your particular situation.

Your Church Can Lead the Way

“For I know the plans I have for you, declares the Lord, plans to prosper you and not to harm you, plans to give you hope and a future.”

Jeremiah 29:11 NIV

Let's Build a Legacy Together.

Start a planned giving program at your church today.

Contact us: (888) 832-1424 | info@GratefulFaithful.com



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