



To: Clergy and Lay Leaders in the Episcopal Diocese of Milwaukee

Recent statistics confirm what you are already experiencing. Struggling with small budgets, small membership numbers and rising expenses is a way of life for 80% of the Episcopal Churches in the United States. Even those of you who belong to larger churches with larger budgets and membership numbers find yourselves struggling with the rising costs associated with attempting to maintain the staffing and programs to which your congregations have become accustomed.

Each of you has unique needs for both protecting your parish assets, and creating the financial footing you need to carry on your mission and ministry now and in the future. We are the Trustees of the Funds and Endowments and we exist to promote the enhancement of the financial futures of the Episcopal Diocese of Milwaukee, its member parishes, and its outreach organizations. Our stewardship of the funds entrusted to us has yielded a 15.5% return over the past year, a 12% return over the past three years, and a 5.66% return over the past five years that saw us through a devastating recession.

We would like to talk to you about how endowments can both cushion the drain of your regular expenses and enhance your stewardship program, and how a program of planned giving can ensure your future mission and ministry. We are particularly interested in talking to those of you who believe you are too small to even consider setting money aside as we have developed some alternatives to enable you to begin an endowment even if you are small and your budget is tight, and we have statistics to share about the high percentage of people in small parishes who remember that parish in their Will.

Our board members are all members of parishes within the Diocese of Milwaukee, and most have been personally involved in establishing, promoting, or managing a parish endowment and or a program of planned giving. We are eager to share our own experience in addition to offering information about how endowment building and planned giving can take place without undermining regular stewardship campaigns, how endowments can be managed effectively, and how parishioners can be assured the endowment will be used as originally intended.

We would welcome the opportunity for our executive director or one of our Board members to speak with your congregation or your vestry at a convenient time of your choosing. If you or someone in your parish is interested in endowment building or a program of planned giving, please contact our Executive Director, Mike Hagon, at MHagonTFE@wi.rr.com or 414-232-7358.

God's Peace Be with You

Trustees of Funds & Endowments

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