



Anglican funds
SOUTH AUSTRALIA

PARISH PLANNED GIVING

Parish Information Document

Product Information for Parishes

Parish Application Form

Terms and Conditions

Issued 1 April 2019

Planned giving

PRODUCT INFORMATION

For Parishes

Overview

AFSA offers a fully administered Planned Giving product where giving can come from bank accounts, AFSA at-call accounts, and credit cards. Proceeds are deposited into a Parish Planned Giving account held in the name of the parish and are made available in the parish's nominated Monthly Income or Cheque Account the next day.

Multiple giving accounts can be opened, allowing separate giving for general parish operations along with other specific projects such as a youth ministry, a building fund, or music foundation.

To help parishioners transition to electronic giving, AFSA can provide booklets of Planned Giving Supporter slips which are placed in the offertory each week in order that they can visibly support the parish. To use this facility please make a note in the *Special Instructions* space on the form.



Benefits to your parish

There are many benefits to establishing a culture of planned giving at your parish including:

- **Increased Giving:** It has been the experience that where planned giving has been put into place, total giving has increased by as much as 30% per annum. This is because it is convenient for parishioners who do not need to remember to bring cash with them to the service, and they can still contribute to their church even if they do not attend church regularly or are on holiday.
- **Regular Cash Flow:** Having an automated collection means that there is a regular cash flow which means that Parish Councils can plan with confidence. Having the ability to have separate giving accounts also allows special projects to be explicitly funded and accounted for.
- **Safety:** Planned Giving reduces the amount of cash collected, which increases the safety for those who must count and bank it. Less time counting cash means more time for fellowship!

How to get started

To establish a planned giving programme at your parish:

1. Decide which giving programmes you would like supported through Parish Planned Giving
2. Decide if your parishioners will require Planned Giving Supporter slips to place in the offertory
3. Complete the attached form and send to AFSA via post or email

Once your facility is set up, the staff at AFSA will then contact you to arrange for the brochures to be delivered, and you can then launch the programme with your parishioners. Parishioners then fill out application forms and can either post them directly to us, or your parish treasurer may like to collect them for internal purposes and then forward them in bulk to AFSA

As completed application forms are received from your parishioners or treasurer:

1. AFSA staff will immediately enter the details into our systems
2. Send a letter of confirmation (along with the booklet of Supporter slips if your parish has decided to use them) to the parishioner

It is that easy. Each day the amounts that have been collected into your Parish Planned Giving account are made available in either your nominated Cheque or Monthly Income Account, which you can then manage through AFSA's online account access.



Please Complete:

New

Amend Existing

1. PARISH INFORMATION

Parish Name

Address

2. PARISH CONTACT DETAILS

Title

Surname

Given Names

Role in Parish

Phone Number

Mobile

Email

Postal Address

3. PLAN PURPOSE

General Parish Purposes

Building Fund

Other - Please specify below

Plan Purpose (if *Other* is selected above)

4. DESTINATION AFSA ACCOUNT

New Cheque Account

New Monthly Income Account

Existing Account

Account Number (for existing account)

5. BROCHURES

Please supply Standard Brochures

Special Instructions

6. AUTHORISATION

I/We confirm that the terms and conditions of the *Parish Planned Giving Agreement* have been read and understood. I/We authorise Anglican Funds South Australia to establish the specified accounts. I/We confirm that we are duly authorised to enter into this agreement on behalf of the parish.

Name

Signature

Date

Name

Signature

Date

Please attach supporting documentation approving this facility (e.g. Parish Council minutes)

For assistance in completing this form please contact AFSA:

Phone: 08 8305 9305

Email: enquiries@anglicanfundssa.com.au

Please return the completed form to:

Email: enquiries@anglicanfundssa.com.au

Mail: Anglican Funds South Australia
18 King William Road
North Adelaide, SA, Australia 5006

Please visit our website at www.anglicanfundssa.com.au for further information on our products and services.

AFSA is an activity of the Synod of the Diocese of Adelaide of the Anglican Church of Australia Inc.

ABN 63 198 215 958

TERMS AND CONDITIONS

General

1. By completing this *Parish Application Form*, you agree to AFSA establishing on behalf of your Parish a Planned Giving Programme.
2. On receipt of a valid *Planned Giving Application Form* from a parishioner, AFSA will effect the transfer(s) as instructed as soon as practicable.
3. AFSA will use best endeavours in the provision of this service, and is not liable for any delays which may occur in the processing of Planned Giving debits, which are beyond its reasonable control.
4. The normal Terms and Conditions of the operation of your nominated Destination account apply.

Cost

5. Electronic transfers from AFSA accounts, and external savings and cheque accounts are free.
6. Transfers from Credit Cards attract a merchant fee of 1% plus processing fee of 55c each. These costs reflect third party costs which AFSA bears in providing this service.
7. Any third party fee incurred by AFSA in the provision of this service (including but not limited to dishonour fees and transaction trace fees) which are not the result of an error or omission or failure to act by AFSA will be passed on at cost.
8. Standard Parish Planned Giving Brochures allowing your parishioners to join your giving programme are supplied free of charge.
9. Where a parish requests customised brochures it agrees to reimburse AFSA for costs incurred.

Availability of Funds

10. For each Planned Giving Programme established, funds will be made available in your nominated AFSA account the following business day.
11. Funds are eligible for Participant Distribution from the day they are made available in the Parish nominated AFSA account.

Confidentiality

12. We will keep any information (including your account details) in your *Parish Application Form*, and the *Planned Giving Application Forms* from your parishioners confidential. We will make reasonable efforts to keep any such information that we have secure and to ensure that any of our employees or agents who have access to information about you do not make any unauthorised use, modification, reproduction or disclosure of that information.
13. We will only disclose information that we have:
 - to the extent specifically required by law; or
 - for the purposes of this agreement (including disclosing information in connection with any query or claim).

*Supporting the mission, education, and charitable works of the
South Australian Anglican community*