



## Agreement for the Stewardship Lifestyle Seminar

Details			
<b>Life Institute</b>	Rev. Andrew Gysi, Ministry Director Drew@LifeInstitute.org 978 Ben Franklin Hwy E. Douglassville, PA 19518 (610) 385-4500		
<b>Church, City, State</b>	Church Name: City, State: Contact: Email: Phone:	<b>Seminar Location</b>	Church Address:
<b>Seminar Dates</b>			

The primary purpose of the Stewardship Lifestyle Seminar is to encourage believers toward financial excellence in all things. To this end we will preach from the Bible the foundational concepts of Stewardship, teach practical applications regarding biblical truths of tithing, giving and generosity, and instruct families on how to be better stewards of all their resources. The Scripture quoted in our seminar workbook is from the English Standard Version (ESV), however, we will teach from your church’s preferred Bible version in all of the Stewardship Lifestyle Seminar presentations.

Teaching about Biblical Financial Stewardship must become an essential part of today’s local church. Your ministry team from Life Institute will emphasize biblical strategies for financial excellence throughout the seminar. In order to bring glory to God, and for the benefit of the church and its families, this Agreement is set forth by both parties represented herein. In as much as the Scriptures admonish the church to “do all things decently and in order” (1 Cor. 14:40) and those who handle God’s word to “correctly handle the word of truth” (2 Tim 2:15), the following standards are of significant importance to both parties:

The \_\_\_\_\_ (Church Name, City, State) agrees to aggressively promote, advertise and plan for the series of meetings and seminars in a timely and professional manner. Other activities will not interfere with these planned meetings.

## 1. Terms

- a) Life Institute agrees to come to \_\_\_\_\_,  
(Church Name, City, State) and do a Stewardship Lifestyle Seminar. This includes providing promotional materials, workbooks, power points, as well as support personnel to assist the church in this event.
- b) \_\_\_\_\_ (Church Name, City, State) , agrees to host the seminar, promote the seminar, and pay for the associated expenses of the seminar.

## 2. Payment Structure

- a) The \$400 deposit locks in your date, and takes care of all pre-seminar expenses, but does not include expenses incurred at the seminar or after the seminar.
- b) At the end of the seminar, \_\_\_\_\_,  
(Church Name, City, State) will receive an invoice for all travel expenses, meals, and workbook fees incurred throughout the seminar.
- c) Expenses that are included in the invoice, but are not limited to, are as follows: airfare, car rentals, mileage, tolls, gas, parking, meals for Life Institute team & lawyer, hotel accommodations (If Congregational housing is NOT used), and workbooks (\$5 /piece).
- d) We request that there be at least one workbook per family, potentially two if desired. It is best if the church covers this cost in order to have greater attendance at the seminar. If a church cannot cover this expense, please speak to a Life Institute representative for creative options to cover this cost.
- e) We ask that you collect a love offering from your congregation to cover our time with you. The typical love offering/honorarium averages from \$500-\$3,000. This is depending on the size of the church. We cannot accept cash gifts for compliance reasons.
- f) Separate checks for expenses and love offerings should be made out to Life Institute and mailed to:

Life Institute  
c/o Karen Vannice  
978 Ben Franklin Hwy E  
Douglassville, PA 19518

### 3. Travel Arrangements

- a) Life Institute will make the travel arrangements and invoice \_\_\_\_\_, (Church Name, City, State) for expenses as soon as possible after the seminar takes place. Life Institute has the final say in determining the best way to travel.
- b) If the Life Institute team is flying to the seminar \_\_\_\_\_, (Church Name, City, State) will be responsible for one (1) economy flight per team member, ground transportation, mileage, fuel receipts, and home airport parking fees.
- c) If the Life Institute team is driving to the seminar using their vehicle, the church will be responsible for reimbursing mileage at the IRS standard mileage rate at the time of the seminar. If a rental car is needed, \_\_\_\_\_, (Church Name, City, State) will cover the cost of the rental car and all fuel/toll receipts.

### 4. Meeting Space

- a) Meeting space will be scheduled by \_\_\_\_\_, (Church Name, City, State), who will also cover all costs associated with hosting the seminar and necessary presentation requirements as outlined below.
- b) The meeting space will be equipped with a projector and screen with an adequate sound system for watching video clips included in the presenter's Power Point presentation.

### 5. Estate Planning Session

- a) The Estate Planning seminar (typically held on Tuesday evening) covers many items such as Wills, Trusts, Power of Attorney and Christian Estate Planning. An attorney will be joining the Life Institute team to provide insight and answer any questions regarding estate planning. The attorney will also assist in helping families create and amend their legal documents to best fit their family's needs.
- b) If your church already has a Christian attorney, or knows of a Christian attorney in the local area, the church may partner with him or her. However, if an attorney is unavailable to the church, the Life Institute will help provide an attorney that will offer a fee reduction to your congregation in case updated or new documents are desired.

### 6. Cancellation Terms

- a) Cancellation 45 days or more prior to the meetings, \$200 plus expenses incurred.
- b) Cancellation 44 days or less prior to the meetings, \$400 plus expenses incurred.

### 7. Failure to Fulfill Obligations

- a) In the event \_\_\_\_\_, (Church Name, City, State) refuses or neglects to provide any of the items stated or fails to make any of the payments, Life Institute shall have the right to refuse to fulfill this contract and the \_\_\_\_\_ (Church Name, City, State) shall remain responsible for all incurred expenses to Life Institute.

## 8. Deliverables & Promotion Schedule

Life Institute agrees to deliver the following:

- a) Life Institute will create and design a seminar schedule that works best with \_\_\_\_\_ (Church Name, City, State) .
- b) Life Institute will provide all bulletin inserts, design various promotional materials, and create different digital assets (i.e. Facebook, Email, Logos) to help promote the seminar.
- c) Life Institute will provide all workbooks needed for the seminar.
- d) Life Institute will work with the church to assist with additional ideas they may have for additional promotional materials. Life Institute will design the promotional materials for the church, due to compliance regulations.

### Seminar Promotion Schedule

The Church agrees to use the promotional materials furnished by Life Institute in a timely manner. Here is the advised schedule to follow:

#### 6 Weeks Prior to Seminar

- You will receive a box of promotional materials from Life Institute
- You will have a meeting with a Life Institute team member to review the promotional timeline and answer your questions

#### 5 Weeks Prior to Seminar

- Send out Save the Date post cards via email, mail, social media and/or handouts
- Arrange accommodations for Life Institute Staff. (Housing, Meals, & Transportation)
- Make a link on the website promoting the seminar

#### 3 Weeks Prior to Seminar

- Mail "Pastor to Congregation" Letter to church
- Display Posters throughout the church
- Arrange nursery staff for the seminar
- Heavily promote the seminar through email, social media channels, and web

#### 2 Weeks Prior to Seminar

- Use "Three Great Blessings" Bulletin insert
- Show Stewardship Lifestyle Seminar video 1
- Promote Personal Stewardship Review Meetings
- Use "First Pulpit Announcement"
- Promote Senior Luncheon (and carry-in dinner if you choose to do that)
- Heavily promote the seminar through email, social media channels, and web

#### 1 Week Prior to Seminar

- Use "Second Pulpit Announcement"
- Use "What You Can Expect" Bulletin insert
- Promote Personal Stewardship Reviews
- Show Stewardship Lifestyle Seminar video 2
- Promote Senior Luncheon (and carry-in dinner if you choose to do that)
- Heavily promote the seminar through email, social media channels, and web

### **Seminar Explanation & Disclosure**

The members of Life Institute are employees of The Life Financial Group, Inc., of Douglassville, Pennsylvania. While our team is well grounded in Scripture they also work in the financial world. This provides both the heart for ministry and knowledge of financial matters to truly assist your church.

Our firm provides many benefits to the local church: a biblical foundation for financial choices, a challenge for parents to pass on financial wisdom, and practical financial applications for church families. Many pastors have found our Tuesday night session to be of particular interest as we explain wills, trusts, and charitable giving techniques. Through our efforts we have seen financial resources that otherwise might not have gone into God's work bequeathed to local churches. We are humbled that the Lord allows us this privilege. To our knowledge, no other ministry is directing assets toward the local church in this manner. In addition to the local church, we also seek to assist Bible Colleges and Seminaries that are preparing young men and women for the Lord's service. God's people will give as their heart is moved; we simply provide the knowledge needed to make wise decisions.

While at your church, we serve with you to encourage financial soundness in families, to promote consistent and regular giving, and to enhance the potential of future church funding via wills, trusts and charitable gifts. We consider this a privilege and a form of ministry if we can help direct assets toward your church.

We take the responsibility of standing in your pulpit and handling the word of God very seriously. Though we are an advisory firm, there will be no solicitation to use our services. In our public communications we will speak in general terms of savings accounts, investment tools, retirement accounts and estate planning. This general information can be implemented by individuals or can be taken to those in your community who provide the same services we do. We are aware that the public nature of our presentation may cause families to ask for our professional services. In all this we can say that our goal while at your church is ministry, not mammon.

#### **A. The Mission Statement and Goal Statement of The LIFE Financial Group, Inc.**

##### **Our Mission Statement:**

**We exist for the sole purpose of providing professional Biblically sound financial services, counseling and education to the Christian community. We work to build up the church by teaching, counseling and motivating believers to better manage their resources.**

##### **Our Goal:**

**To motivate individuals in applying God's principles to: Develop priorities; Give generously, Get out of debt, Invest wealth carefully, Instruct their children and grandchildren in the basics of finance, and to Include the Lord's work in their Wills and Trusts**

### Seminar Agreement

To the best of the leadership team’s ability, they will be present in each public meeting conducted by the Life Institute. They will also personally promote the meetings and will encourage the members and friends of the church to take part in both the public sessions as well as encouraging the individual financial stewardship reviews.

The Life Institute staff\* agrees to present the “Stewardship Lifestyle Seminar” in a professional manner at the times and places indicated above. Life Institute agrees to furnish promotional information, suggested mailings, bulletin inserts, posters and other materials as will be required to have a successful seminar. Life Institute will adhere to a high standard of ethics as well.

- We will not place pressure on anyone to utilize the services or products of any particular law firm, accountant or other financial professional.
- We will not use any personal information voluntarily given; it will be kept strictly confidential.

*\*DISCLOSURE: Each of the team members who are involved in teaching the Life Institute material and who provide financial counsel and advisory services are licensed through Geneos Wealth Management, Inc., member FINRA and SIPC. The Life Institute team also has Ordained Pastors who help with the teachings and Personal Stewardship Reviews. Life Institute is the ministry arm of The Life Financial Group, Inc., which has been serving the Christian Community since 1978. They are located at 978 Ben Franklin Hwy. Douglassville, PA 19518. The President is Roy L. Russell, CFP. He can be reached at (610) 385-4500.*

***The foregoing is accepted and agreed to by the following Pastor and Leadership Team. Please sign two copies. Retain one for your records; return one to the Life Institute with your check.***

_____		_____
<i>Church Pastor</i>		<i>Date</i>
_____		_____
<i>Church Leadership Team Member</i>	<i>Title</i>	<i>Date</i>
_____		_____
<i>Church Name, City, State</i>		<i>Seminar Dates</i>
_____		_____
<i>Life Institute Representative</i>		<i>Date</i>

***Please submit this page along with a check payable to “Life Institute” for \$400. These can be mailed to 978 Ben Franklin Hwy E, Douglassville, PA 19518***