Matt Hames shares high-level findings from National Christian Foundation's recent comprehensive research study on Christian generosity, helping us move to a deeper level of engagement with clients in their giving strategy.

How the data was gathered

Qualitative: in-depth phone interviews

Quantitative: 1,287 Christian givers and 245 advisors

How KA advisors see themselves

Broad view of generosity

86% – "I give my time, skills, or influence to charities."

Generosity advocates

72% – "I consider myself a generosity advocate."

What would cause one of your clients to describe you as a generosity advocate?

Understand the value of giving conversations

78% – see giving conversations as an opportunity to develop **deeper relationships with clients**

73% – see giving conversations as an important part of the **value you bring to your clients**

Majority have **high confidence** in these giving topics:

72% – arranging direct payments/grants to a charity or place of worship

63% – setting up a DAF

61% – executing a non-cash gift

Majority have **less confidence** in these giving topics:

4% – setting up a supporting organization

9% – establishing a private or family foundation

28% – connecting clients to a community of givers

30% – evaluating charitable giving organizations

39% – giving through a community foundation

44% – establishing a trust

How might you learn more about some of these topics through further education or professional development?

Kingdom Advisors is the leading advocate for the Christian financial industry.

We offer a step-by-step process to confidently deliver advice that aligns with Christian values.

Study Groups connect like-minded peers for encouragement, best practices, and accountability.

Mind map: Underlying values of Christian givers

"What are you looking for in someone who helps you with your charitable giving?" (advisor, firm, or charitable giving organization)

Preferred attributes

Faith-/ministry-based giving partner

Helps me give faithfully with a biblical worldview

Trusted partner

37% – shared values: Christ-centered, networked with community of other Christian givers

36% – strong moral character: ethics, integrity, confidentiality

27% – significant technical expertise: financial/tax expertise, certified, experienced

How can you ensure you routinely express in client conversations ways your values align with theirs in the area of generosity?

Benefits received

Helps me be a good and wise steward of what God has given me

Overwhelming driver of Christian givers

Unifying belief: God owns it all

Emotional outcome of giving

Feeling a greater purpose in life

How might this insight drive the decisions you make for your practice?

Personal value (ultimate desire or end goal)

Faithfulness (expressed by over 90% of respondents)

This framework of faithful stewardship applies to how clients view all their resources and total assets, not just their giving.

Mindset: Gift-makers and journey-takers

When you consider current or potential clients, is it in terms of their generosity mindset or their level of wealth?

Gift-makers

Want giving transactions to be done in an efficient, confidential, and trusted manner

Journey-takers

In addition to taking care of giving transactions, they want help along their giving journey (connecting them to a broader network of Christian givers, sharing knowledge, increasing impact through collaboration, generosity discipleship, etc.)

	Gift-makers	Journey-takers
Trust is built primarily through…	Significant technical expertise	Shared values and moral character
Giving aspiration	Peace of mind/less stress	Faithfulness
Priority	Make it easy/ streamlined for me	Help me be a good/wise steward
Ways to deliver	• Responsive customer service • High-tech solutions/platforms • Low cost/fees (relative to the value received)	• Faith-based giving organization • Help them with a biblical worldview • Collaboration

Discussion Questions

1. When you hear the term "generosity advocate," what does that mean to you? What would cause a client to describe you that way?
2. How would you describe your confidence level in the giving topics Matt discussed? (See Personal Reflection #1 below). If you have high confidence, how do you lead clients in conversation about one or more of these topics?
3. Do you consider a potential or current client in terms of their mindset regarding generosity? How can you determine where they fall on the spectrum from gift-maker to journey-taker?

Personal Reflection

1. Rate your confidence in discussing the following giving topics on a scale of 1 (low) to 10 (high).
   - ☐ Arranging direct payments/grants to a charity or place of worship
   - ☐ Setting up a DAF
   - ☐ Executing a non-cash gift
   - ☐ Setting up a supporting organization
   - ☐ Establishing a private or family foundation
   - ☐ Connecting clients to a community of givers
   - ☐ Evaluating charitable giving organizations
   - ☐ Giving through a community foundation
   - ☐ Establishing a trust
2. List 2-3 giving topics in which you would like to grow in knowledge and confidence with clients.
3. Who might help you take the next step?

Go Deeper into the Research

Resources from NCF

Scan the code for the full report on the generosity research study.

Matt Hames' slide presentation as a pdf – available as a related resource to this Study Group