

LCMS Foundation Fast Facts

- **Relationships:** The LCMS Foundation is The Lutheran Church—Missouri Synod's only organization that provides Lutheran donors with charitable expertise and opportunities to ensure that families are provided for and beloved ministries are supported.
- **Beginnings:** The LCMS Foundation was begun in 1958 by a dedicated group of Lutherans who said that this new organization would "be a vehicle which can, and under the blessing of God will, usher in a completely new era for our church."
- **Focus:** The LCMS Foundation is entirely donor-directed, transferring gifts only as the donor chooses.
- **Service to Individuals:** The LCMS Foundation provides a trained gift planning counselor who helps individuals like you find ways to practice biblical, Christ-centered stewardship.
- **Financial Management:** The LCMS Foundation serves by managing financial instruments and the gifts they represent, entrusted to it by congregations, organizations and people like you.
- **Assets:** As of fiscal year 2009 which ended June 30, 2009, the Foundation has more than \$674 million of assets.
- **Gifts to Ministry:** In 2009 The LCMS Foundation generated more than \$60 million in new gifts for more than 690 LCMS ministries. These funds were the result of either direct gifts or distributions from matured gifts, such as trusts, endowments, gift annuities, pooled funds and bequests.
- The LCMS Foundation provides trained, professional Christian gift planners who are ready to work with you, your congregation or LCMS organization in:
 - Developing personal Lifetime Plans for Giving.
 - Making direct gifts to missions and ministries of your choice.
 - Creating trusts for your family and missions and ministries of your choice.
 - Starting and growing endowments for your congregation or ministry.
 - Ensuring that your gift is used as you wanted it to be used.
 - Managing your gift, trust or endowment so that your gift is making a difference for our Lord!
- **Services to Congregations:** The LCMS Foundation provides a wide variety of services to congregations, including a convenient, one page list of stewardship and giving resources.
- **Congregational Endowment Funds:** Through a local Gift Planning Counselor as well as other Foundation staff, materials are available to assist congregations and other organizations, such as schools and ministries, in establishing a congregational endowment fund through the Foundation.

Benefits for You and Your Ministry

The Lifetime Plan for Giving™ process:

- Provides peace of mind knowing your house is in order.
- Provides comprehensive expertise and resources to help you plan and direct your passion for giving to your heirs and to the Lord's work.
- Provides an experienced staff to encourage you through the planning process.
- Helps reduce unnecessary probate and administrative costs.
- Helps you navigate potential pitfalls in the planning process.
- Helps you create a property transfer plan with the greatest tax efficiency.
- Identifies ownership issues and follows up to ensure titles are clear, correct, and coordinated.
- Helps you think through the issues and consider the best choices in naming representatives and nominations you trust to fulfill responsibilities.
- Helps Christian parents walk through the steps needed to protect minor children and give them a witness to their faith.
- Guides you to consider all the issues important to end-of-life planning and protecting your physical and material needs within your value structure.
- Provides information for you to consider all charitable planning options that allow you to bless and not curse your beneficiaries.
- Identifies how you can provide a witness to your faith and a family blessing in estate and financial planning.
- Helps you understand your financial and estate planning options and narrows the issues with a discussion guide and a design for your advisors.
- Gives you the satisfaction of knowing that you have fulfilled your baptismal heart's desire.
- Transfers the blessing of inheritance in Christ to the third and fourth generation.

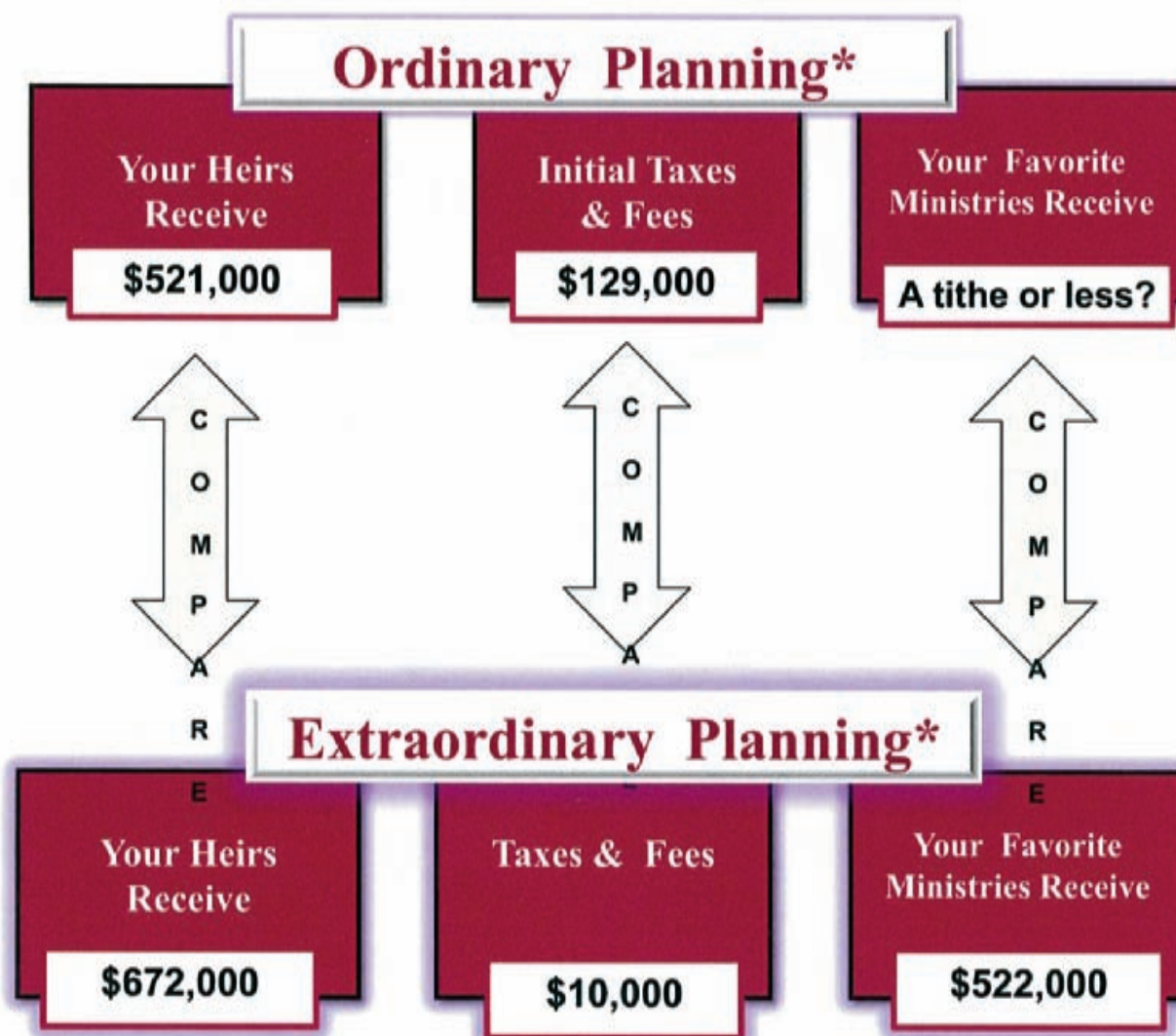
Ordinary Planning or Extraordinary Planning?

What Will You Leave Behind?

If I could show you a way to give your heirs exactly what you want while making a significant impact on the ministries you love, would you be interested?

More Than You Can Ever Imagine!

Now to him who is able to do far more abundantly than all that we ask or think, according to the power at work within us, to him be glory in the church and in Christ Jesus throughout all generations, forever and ever. Amen. Ephesians 3:20-21



* This example uses the same estate for both plans.

Notes and Discussion Questions

My notes:

What things in the video caught your attention or piqued your interest?

How might this process help people in your congregation and your congregation as a whole?

What did you learn that you didn't know before?

What would you like to know more about or receive additional information on?

Your Lifetime Plan for Giving Journey

Interest Survey

Do you have a will or Christian estate plan that is current, accurate and reflective of your giving desires? Yes No

Check the items that interest you.

- Writing a statement of faith as a witness to family and friends.
- Protecting my children/grandchildren from a lump sum inheritance.
- Creating or updating my power of attorney, trustee, guardian, or health care directives.
- "Give it twice" charitable trust.
- A "family gift fund" that distributes gifts to ministry and teaches stewardship.
- "Adopting the Lord" by allocation a portion of my estate to the Lord's work.
- Increase my income now and make a deferred gift when I die.
- Reduce taxes and maximize the economic benefits to my family and ministry.

I would like to be contacted by an LCMS Gift Planner to discuss my plan: Yes No

Name _____

Address _____

City _____ State _____ Zip _____

Telephone (home) _____ (work or cell) _____

E-mail _____

I would like more information about:

Your Lifetime Plan for Giving Journey

For More Information Contact

My LCMS Foundation Gift Planner *(to be personalized by supporting gift planner)*

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

E-mail _____

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