



## **Lutheran Planned Giving of Wisconsin**

*A Partnership of ELCA Ministries Serving Wisconsin*

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### **What Can Lutheran Planned Giving Do For Your Congregation?**

1. Provide Support for Your Stewardship Education
  - a. Temple Talks
  - b. Sermon
  - c. Meeting with groups of leaders
  
2. Lead an Estate Planning and Planned Giving Presentation
  - a. During the adult education hour or at other occasions
  - b. For your Seniors group
  - c. For "empty nesters" group
  
3. Assist in establishing a "Mission Endowment Fund"/ "Foundation"
  - a. Meet with the endowment committee
  - b. Make a presentation to the church council
  - c. Make a presentation to the congregation
  - d. Help to develop a marketing plan for your endowment

### **How Can Lutheran Planned Giving Assist You Personally?**

1. Lutheran Planned Giving offers a free no-obligation consultation on estate planning and planned giving that explains:
  - a. When do you need a will?
  - b. When and how to update an existing will
  - c. How proper beneficiary designations can provide planning flexibility for your loved ones
  - d. How a planned gift can provide current or deferred, tax free, income for life
  - e. How planned giving can be used to help teach your children good stewardship habits
  - f. How planned giving can help you generate tax free income from your pension plan or IRA's
  - g. How planned giving can help you increase your current gifts to your church or church-wide ministries
  
2. Provide information and resources to assist ELCA Lutherans in accomplishing their charitable goals and create a legacy for ministry