

Trinity Lutheran Church ENDOWMENT FUND

The Trinity Lutheran Endowment Fund was established to help our congregation enhance the mission of the Church, apart from the general operating budget. Gifts will extend God's work within our Church and our community.

Endowment funds differ from annual giving. As a permanent fund, only income from interest or dividends is available for distribution.

Gifts are always welcome and donors may designate the purpose and use of all gifts, if they desire. Gifts to the Endowment Fund provide a means to support your Church during and after your lifetime.

USE OF ENDOWMENT FUNDS:

Investment income from the Endowment Fund is used for the following beneficial purposes not usually included in the church's annual operating budget. Gifts may include donor restricted gifts.

- ✓ Extend the ministries of the church
- ✓ Provide seed money for new missions and/or ministries
- ✓ Support special ministries such as scholarships and youth programs

...for the future of our Church...

TYPES OF GIFTS THAT CAN BE MADE TO THE ENDOWMENT FUND:

The TLC Endowment Fund can receive many forms of gifts and bequests.

Cash and Securities. You can make a contribution of cash and securities to the Fund on a one-time or periodic basis. Gifts of appreciated stock and bonds often can provide you significant tax advantages.

Real Estate. You can make a contribution of real estate or other items of value in consultation with the Endowment Fund Board.

Life Insurance. You can make a gift to the Fund of an existing life insurance policy or purchase another policy, with the Fund named as the principal beneficiary.

Charitable Gift Annuity. You can create a Charitable Gift Annuity providing income for yourself or someone else while also providing the Fund a sizable portion.

Trust. You can establish a trust with all assets managed by a trustee, with the Fund as the named beneficiary.

Bequest by Will. You can make a bequest to the Fund through your will, permitting a gift to the Church at your death in full accordance with your specified wishes.

IRA, Profit Sharing, 401(k) Plan. Because these assets can be subject to both income and estate taxes at death, designating the Church as beneficiary can avoid all taxes and maximize the value of the assets.

FAQ's

Why does Trinity Lutheran Church need an Endowment Fund?

The establishment of an endowment fund can provide long-term viability for the Church and its mission. Funds given will provide future members of the congregation with a means to support future missions and ministries.

Can I decide how/when my gift is used?

Yes, you may request that your gift has a designated use. Please consult with an Endowment Fund Board member before specifically designating any gift. Funds that are undesignated will be used to support various church ministries.

When is a good time to consider a gift to the Endowment Fund?

Any time is a good time to consider a donation! It is important to remember that a funeral is not the only appropriate time to donate to the Fund...your donation will begin its work for the mission of the Church as soon as you contribute.

What are the benefits of giving to the Endowment Fund?

Charitable gifts to the Endowment Fund can offer financial benefits such as a tax deduction, reduction of estate taxes and avoiding capital gains tax. Please consult with your accountant or attorney to help you determine the income tax or estate tax benefits of your proposed gift.

In addition, you will be a part of the advancement of the Church and its mission during your lifetime and beyond.

Who manages the Endowment Fund and its usage?

Decisions on the Endowment Fund usage will be based on the recommendation of the Pastor and the Endowment Fund Board. The assets of the Endowment Fund are held and managed at Thrivent Financial for Lutherans. Investment decisions are made with the recommendation of Thrivent financial advisors and the approval of the Endowment Fund Board.

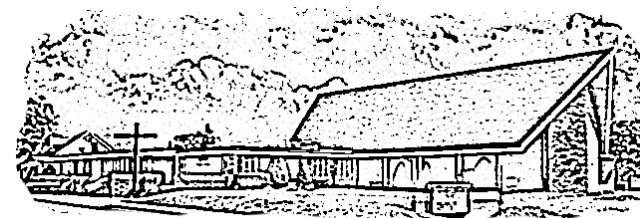
FURTHER INFORMATION:

If you are interested in further information or would like to give a gift at this time, an Endowment Fund Board member would be happy to meet with you personally to explain the Endowment Fund options and assist you with any gift you would like to make.

**Please contact the church office
to be put in touch with an
Endowment Fund Board member.**

TRINITY LUTHERAN CHURCH

ENDOWMENT FUND



MEMORIALS

CHARITABLE GIVING

SPECIAL GIFTS

Trinity Lutheran Church
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