



Lutheran Planned Giving of Wisconsin

A Partnership of ELCA Ministries Serving Wisconsin

FOR THE RECORD

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A Publication for ELCA Congregations and Ministries

Our partner ministries are committed to providing assistance to churches and individuals in gift planning. This publication is provided to help you think about your own charitable giving, and promote, good whole-life stewardship.

Become a “Willing” Witness

When it is time to update your will or trust consider adopting a charity or charities as a member of your family. It is advised to review your will every 3-5 years or when the family changes in any way affecting the distribution of assets. When you do make updates, or create your first will, consider including a bequest, a portion of your estate, for ministries of your church. Let your will become a witness to your devotion to Christ and his people by supporting your beloved ministries beyond your lifetime.

What about family?

Remember your family in your estate plan. Also remind them that part of our Christian responsibility is to also think of others. Including charity in your estate plan becomes a powerful witness to your family of the charitable Christian values that you have cultivated during your lifetime and wish to pass on to those you love when you are gone. Most often family is grateful when their loved ones remember others when they no longer need their assets. A sense of pride and joy is theirs as well when a plan is put in place that makes sure that charity is remembered as well as family in the distribution of assets. Do you remember the last thing someone said to you in a conversation? The

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last words we hear from a loved one linger with you a long time – maybe for a lifetime. In fact, it has the capacity to encourage others to do follow your example. In the end, that’s a legacy worth considering.

Replace taxation with Philanthropy

Depending on the size of your estate one or more charitable bequests could be good stewardship of resources. For example, you may be able to turn tax dollars into philanthropy; or, make charitable gifts with taxable assets while giving non-taxable ones to your loved ones. Why give a gift with strings attached; especially, if it means an heir is liable for taxes you could have helped him or her avoid? So, think it through. Take seriously the task of planning and preparing your will, seek the advice of trusted advisors and choose an attorney who will best serve YOU, your desires, and, if you choose, your desire to be a willing witness.

Help is available

Remember the services of the planned giving offices of Lutheran planned Giving of Wisconsin are available to you at no cost or obligation. Our goal is simple: to help you do what is best for you, your loved ones and Charities you love. Together we can make a difference. Together we encourage generosity for generations.

For more information about including charity as a member of your family please contact Regional Gift Planner Lynn Tully or Larry Westfield. They are available to help you fulfill your family and charitable goals.

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