

Discovering Your

Lifetime Plan for Giving™

For Family and Ministry
Today, Tomorrow and Forever

Prepared For:



Christian stewardship is...

- The free and joyous activity of the child of God
- Managing all of life and life's resources
- For God's purposes.

God has placed a Lifetime Plan for Giving in each Christian's heart. The Gift Planning goal is to help Christians bring that plan to the surface and make it a reality.

Christian stewards understand they are managers, not owners.

The earth is the Lord's, and everything in it, the world and all who live in it. Psalm 24:1

It does not matter how little or how much you manage.

His master replied, "Well done, good and faithful servant! You have been faithful with a few things; I will put you in charge of many things." Matthew 25: 21

Your attitude and your motives do matter.

Then he said, "This is what I'll do. I will tear down my barns and build bigger ones, and there I will store all my grain and my goods. And I'll say to myself, you have plenty of good things laid up for many years. Take life easy; eat, drink and be merry." But God said to him, "You fool! This very night your life will be demanded from you. Then who will get what you have prepared for yourself?" This is how it will be with anyone who stores up things for himself but is not rich toward God. Luke 12: 20-21

Giving is to be an integral part of your stewardship.

"But just as you excel in everything—in faith, in speech, in knowledge, in complete earnestness and in your love for us—see that you also excel in this grace of giving." 2 Corinthians 8: 7

There are attributes & characteristics of God one will never experience apart from the experience and relationship of giving.

Did you know Jesus never hesitated to talk about money?

- Sixteen of the 38 parables are based on how people handle their money and possessions.
- One of every ten verses in the Gospels deals directly with the subject of money.
- The Bible has 500 verses on prayer, less than 500 on faith, but more than 2,000 on money and possessions!

Your Lifetime Plan for Giving...

...is a Gift Planning Process combined into four parts. These parts are designed to guide and educate you through the process of Christian estate and gift planning.

▶ Part I: The Discovery ◀

Part II: The Proposals

Part III: The Summary

Part IV: The Implementation

The Five P's of the Gift Planning Process

- **Prayer**

Ask for God's guidance in putting together a plan that will Transfer the Blessings entrusted to you on to your family, heirs, friends, and the Lord's work in a way that it will bear fruit that will last.

- **People***

Discuss who is in the family and what the special needs are that need to be taken into consideration in the planning.

- **Property***

Record the assets that God has entrusted to your care to determine the size of the estate and understand how laws affect your plan.

- **Plans**

Talk about the Lifetime Plan for Giving that God has placed in your heart for your family and the Lord's work.

- **Planners**

List others you may need assistance from to complete your plan, such as an attorney, CPA, insurance representative, etc.

***As you prepare for this visit, please complete the **People** and **Property** sections as best you can. This reduces the amount of time gathering this information during the visit.**

Prayer

Dear gracious heavenly Father,

We recognize that you are the Creator of Creation and thus the Owner of Creation. You have called us to use our blessings to serve You by serving others.

Today we begin the process of putting together a plan. This plan will Transfer the Blessings entrusted to us on to our children, heirs and to You, O Lord, which will prove to be a blessing for all. Guide and direct our thoughts and hearts so that what is planned will truly bear fruit for Your kingdom, fruit that will last.

All this we ask in the name of our precious Savior's name, JESUS!

Amen.

Home congregation: _____

City: _____ State: _____ Pastor: _____

Church activities:

Other volunteer activities:

Ministries and other charities of interest:

Has the LCMS Foundation assisted you with giving to ministry in the past?

Yes _____ No _____ If yes, when? _____

People

Full Name 1: _____ DOB: _____ SSN: _____
 Title: Mr. _____ Rev. _____ Dr. _____
 Full Name 2: _____ DOB: _____ SSN: _____
 Title: Miss _____ Mrs. _____ Ms _____ Dr. _____
 Address: _____ County: _____
 City: _____ State: _____ ZIP: _____
 Primary Phone: _____ Secondary Phone: _____
 Primary Email: _____ Secondary Email: _____
 Occupation 1: _____ Occupation 2: _____

Your Children

1st Child: _____ DOB: _____
 Address (if not living at home): _____
 2nd Child: _____ DOB: _____
 Address (if not living at home): _____
 3rd Child: _____ DOB: _____
 Address (if not living at home): _____
 4th Child: _____ DOB: _____
 Address (if not living at home): _____
 5th Child _____ DOB: _____
 Address (if not living at home): _____
 6th Child _____ DOB: _____
 Address (if not living at home): _____

Your Grandchildren

1st Grandchild: _____ DOB: _____
 Address: _____ Parents: _____
 2nd Grandchild: _____ DOB: _____
 Address: _____ Parents: _____
 3rd Grandchild: _____ DOB: _____
 Address: _____ Parents: _____
 4th Grandchild: _____ DOB: _____
 Address: _____ Parents: _____
 5th Grandchild: _____ DOB: _____
 Address: _____ Parents: _____
 6th Grandchild: _____ DOB: _____
 Address: _____ Parents: _____
 7th Grandchild: _____ DOB: _____
 Address: _____ Parents: _____

Property

Assets				Annual Return Rate	Cost Basis	POD: List by class (Spouse, Children, Parents, Father, Mother, etc.)	
<i>Type in First Name(s) or Initials →</i>	First Name	Joint	Second Name			Primary	Secondary
Cash Equivalent							
Checking/Savings Accts.							
Money Markets							
LCEF Savings Plan							
Other:							
Invested Assets							
CDs							
Mutual Funds							
Stocks							
Government Bonds							
Bond Funds							
Treasury Bills							
Credit Union Shares							
LCEF Plans							
Other:							
						Beneficiaries	
Qualified Plans							
						Primary	Secondary
Keoghs (401K)							
TSAs (403B)							
IRAs							
Roth IRAs							
Vested Pension Plan							
Profit Sharing Plan							
Annuities							
Life Insurance							
Permanent (whole)							
Term							
Universal							
Second-to-Die							
Real Estate							
Home							
Land							
Vacation Property							
Rental Property							
Hunting Property							
Other:							
Business Ownership							
Sole Proprietor							
Partnership							
Limited							
General							
Corporation							
Sub-S							
C-Corp							
Sub Totals:	\$ -	\$ -	\$ -				

Notes

Assets, continued				Community Property or owned by Living Trust
<i>Type in First Name(s) or Initials →</i>	First Name	Joint	Second Name	
Personal Property				
Car 1				
Car 2				
Car 3				
Recreation Equipment				
Household Furnishings				
Jewelry				
Collectibles				
Antiques				
Other:				
Sub Totals:	\$ -	\$ -	\$ -	\$ -
Grand Total:	\$ -			

Liabilities				Community Property or owned by Living Trust
<i>Type in First Name(s) or Initials →</i>	First Name	Joint	Second Name	
Mortgages				
Home				
Second Mortgage				
Farm				
Vacation Property				
Business Property				
Other:				
Loans- Secured				
Home Improvement				
Vehicles				
Personal				
Life Insurance				
Other:				
Loans- Unsecured				
Bank				
Personal				
Education				
Credit Card				
Other:				
Loans- Co-signer				
Sub Totals:	\$ -	\$ -	\$ -	\$ -
Grand Total:	\$ -			

Notes

Current Estate Value				Community Property or owned by Living Trust
<i>Type in First Name(s) or Initials →</i>	First Name	Joint	Second Name	
Total Assets	\$ -	\$ -	\$ -	\$ -
Total Liabilities	\$ -	\$ -	\$ -	\$ -
Sub Total Estate	\$ -	\$ -	\$ -	\$ -
Grand Total:	\$ -			

Current Income Sources			
<i>Type in First Name(s) or Initials →</i>	First Name	Joint	Second Name
Income			
Current Job			
Social Security			
Retirement			
Dividends			
Interest			
Child Support			
Rental Income			
Other:			
Bonuses			
Insurance			
Disability Insurance			
Long Term Care			
Charity Beneficiary Life Insurance			
Health Insurance			
Medicare Supplement			
Other:			
Sub Totals:	\$ -	\$ -	\$ -
Grand Total:	\$ -		

Plans

Do you have any of the following?

- Will Yes ___ No ___ Date: _____ State Signed: _____
- Power of Attorney Yes ___ No ___ Date: _____ State Signed: _____
- Revocable Living Trust Yes ___ No ___ Date: _____ State Signed: _____
- Health Care Directive Yes ___ No ___ Date: _____ State Signed: _____
- Charitable Trust Yes ___ No ___ Date: _____ State Signed: _____
- Gift Annuity Yes ___ No ___ Date: _____ State Signed: _____

Who would you like to:

	1 st Name	2 nd Name	3 rd Name
Handle your financial affairs if you become incapable of doing so (Durable Power of Attorney for Financial Affairs/Trustee)?	_____	_____	_____
Make medical decisions for you if you become incapable of doing so (Durable Power of Attorney for Health Care)?	_____	_____	_____
Wind up the affairs of your estate (Personal Representative/Trustee)?	_____	_____	_____
Become guardian of your children?	_____	_____	_____

Do you feel that the financial assets that you currently manage will be sufficient to provide for you until God calls you to heaven?

Yes _____ No _____

Please describe the amount of gifts you have made to any one individual (not including a spouse) in any year that exceeded \$12,000:

Do you or your family have any special health concerns that you would like to plan for?

Yes _____ No _____ If yes, please explain: _____

Have you or your spouse lived in other states, or owned property in other states?

Yes _____ No _____ If yes, where? _____

Do you expect your income to change significantly in the future?

Yes _____ No _____ If yes, when? _____

Do you expect your income needs to change significantly in the future?

Yes _____ No _____ If yes, when? _____

Do you itemize your income tax deductions?

Yes _____ No _____

Do you currently have carryover charitable income tax deductions?

Yes _____ No _____ If yes, what is the apporoximate amount? _____

What is your current charitable giving? _____

Benefits to Ministry

Understanding the ministries you intend to benefit is important to your Lifetime Plan for Giving. Please use this section to specify which local, district and national ministries your plan will bless. The Lutheran Annual and the Synod's website, www.lcms.org, are excellent resources for researching ministries.

Local Ministries

These organizations include your congregation, a specific Lutheran school or a local chapter of a regional ministry. Please list them below.

District/State Ministries

This could include the district itself and other district-supported ministries such as camps and schools. Please list them below.

National/World-Wide Ministries

This could include the Synod, Foundation, World Relief/Human care, KFUE and other ministries. Please list them below.

Stewardship Goals

Understanding your Stewardship Goals is important when discovering Lifetime Plan for Giving. In the following two sections (a and b), please review each statement. Next, number each statement in order of importance, “1” being the most important. Leave blank any statements that do not apply.

a) While I am living I want to:	#
Give financially to the Lord’s work	_____
Establish a legacy gift to provide on-going support for the Lord’s work	_____
Provide for my family.	_____
Maintain my standard of living	_____
Increase my level of income.	_____
Minimize my taxes.	_____
Provide for my retirement.	_____
Provide for my long-term health care needs.	_____
Provide an inheritance for my family.	_____
Provide financial assistance for education of my family	_____
Provide a significant gift to ministry for a special project (please describe).	_____
_____	_____
Provide a significant gift to ministry while maintaining involvement in how the gift is used.	_____
Diversify the assets in my estate.	_____
Discontinue or simplify management of some of my assets (please describe).	_____
_____	_____
Begin distributing at least a portion of my estate to family.	_____
_____	_____
b) When God calls me home I wish to:	#
Make a gift to the Lord’s work.	_____
Establish a legacy gift to provide on-going support for the Lord’s work	_____
Treat family equally when distributing inheritance.	_____
Distribute inheritance to family in a lump sum.	_____
Distribute at least a portion of inheritance to family over a period of time rather than all in a lump sum.	_____
Provide some restrictions on ability to spend inheritance (please describe).	_____
_____	_____
Provide special care of my family (please describe).	_____
_____	_____
Express my Christian faith and give encouragement to my family.	_____
Involve my family in giving to ministry.	_____
Minimize the cost of my estate settlement.	_____
Keep my estate settlement private.	_____
Provided safeguards to ensure my estate is handled appropriately.	_____
Minimize taxes.	_____
_____	_____

Planners

Attorney: _____	Tax Advisor: _____
Address: _____	Address: _____
City, State ZIP: _____	City, State ZIP: _____
Phone: _____	Phone: _____
Email: _____	Email: _____
Insurance Counselor: _____	Stock Broker: _____
Address: _____	Address: _____
City, State ZIP: _____	City, State ZIP: _____
Phone: _____	Phone: _____
Email: _____	Email: _____

Counselor/Planner Comments:

Thank you for completing your Lifetime Plan for Giving survey.

The next step...

Your Lifetime Plan for Giving process is organized into four parts. You have completed the first part, the **survey**, which measures your current situation and identifies your goals for your Christian estate and gift plan.

The second part, the **proposals**, are organized and presented to you for selecting the plan that best meets those wishes and goals. The **proposals** combine the objective information in the survey, information gathered through the personal interview and recommendations from the LCMS Foundation. The **proposals** also contain educational information about estate planning tools and the LCMS positions on various topics.

The third part is the **summary** of your Lifetime Plan for Giving. This is an outline which will be provided to your attorney. The assistance of your attorney is needed to implement the plan. The LCMS Foundation does not provide estate planning or legal advice, and does not provide legal documents other than charitable trust and endowment agreements managed by the Foundation.

The final part is **implementing** your Personal Gift Plan. Your attorney will advise you regarding your plan and prepare and review the necessary legal documents. The **summary** that we provide to your attorney will assist considerably in this process. The LCMS Foundation will continue to be available to help as needed, including offering our services to compare the final legal documents to your plan summarized in part three.

We will assist you every step of the way. Please don't hesitate to ask questions at any time.