



Evangelical Lutheran Church in America
God's work. Our hands.

faithful stewards . . . lasting impact . . .

faithful stewards . . . Gift Planners provide assistance in gathering information to prepare a will or trust and help in maximizing the distribution of assets to family and Ministries. Gift planners sell no products or services and it is a service provided by the ELCA. Gift planners talk about being good stewards of the gifts that the Lord has given each of us, as everything we have comes from the Lord. The size of the estate does not matter; it is what you want to accomplish with what you have to give that matters.

lasting impact . . . Gift Planners help people maximize the distribution of their assets to their heirs, using tools that will save on income and inheritance taxes, and help them support Ministry that has and is important to them, giving them an opportunity to make a difference. We refer you to your attorney, CPA and/or Financial Planner if appropriate.

Items to be discussed:

- It is estimated that between 50 - 75% of the people do not have up to date wills.
- Christian Preamble
- Personal Representative/Executor
- Durable Power of Attorney for Financial Matters
- Durable Power of Attorney for Health Care
- Guardians for your Children
- Minors Trust for Children and or Grandchildren under the age of 18
- Special Needs Trust for a person receiving Government Assistance
- Beneficiary Changes
- Life insurance and qualified plans are controlled by your beneficiary designations – not your will or trust.
- If you die without a will or trust in place, your children could receive a lump sum distribution at the age of 18. Is that the best way to bless them?
- Your children might need to liquidate assets (home, stock, business, land, etc. . .) at below-market value to pay Federal Estate Taxes.
- The average time it takes to spend an inheritance is 18 months – no matter what the size of the inheritance or the age of the recipient.
- Opportunities to give to the Ministries that you are passionate about and be an example to your heirs and to others by sharing your gifts.

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