

Tuesday

8:00 a.m. Welcome and Introductions *
Devotion Phil Krupski

Christian Stewardship and Gift Planning

8:45 a.m. **Born for Blessings Bible study** Rev. Phil Krupski
 - The Springboard of Being Blessed
 - The Illusion of Ownership
 - The Unifying Presence of God's Grace

9:45 a.m. **Culture and Perspectives** *

10:15 a.m. **BREAK**

Lifetime Plan for Giving Process

10:30 a.m. **Guide - LCMS Foundation approach to charitable planning** Guest Gift
Survey - Lifetime Plan for Giving Journey Planning
Counselor

12:00 p.m. **LUNCH**

1:00 p.m. **Exploring Conversations in the Lifetime Plan for Giving Journey** *

Helping People Raise their Hands

1:30 p.m. **Developing a Gift Planning Emphasis for Your Ministry** Guest
 - Transfer the Blessings Emphasis for Congregations Counselor
 - Alternative Models that Work *
 - Building the Infrastructure within Organizations

2:30 p.m. **BREAK** *

2:45 p.m. **Working Effectively with Professional Advisors** Guest
Issues & Concerns with Lifetime Planning for Christian Stewards Counselor

4:15 p.m. Review and preview; dismissal at 4:30.

**Philip Meitzen is primary Instructor unless another presenter is indicated*

Wednesday

8:00 a.m. Review - Preview *
Devotions

Building the Best Gift Plans and Blended Gift Plans with Case Studies

8:30 a.m. **Revocable Gift Plans:** *
- Will Bequests and Revocable Trust Distributions
- Beneficiary Designations of Contractual Assets
- Payable on Death and Transfer on Death Designations
Life Insurance Gifts

10:15 a.m. **BREAK**

10:30 a.m. **Charitable Gift Annuity** *
Charitable Remainder Trust

12:00 p.m. **LUNCH**

1:00 p.m. **Donor Advised Fund** *
Personal Endowment Fund

2:15 p.m. **BREAK**

2:30 p.m. **IRA Rollover** *
Securities and Appreciated Assets
Accepting, Counting and Processing Gifts

Context for Charitable Planning and Taxation

3:00 p.m. **Cultural Facts from the Gift Planning Landscape** *
Probate, Estate and Financial Planning Context
Tax Economics that Affect Charitable Planning

4:20 p.m. Review; field application; dismissal at 4:30.

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Thursday

8:00 a.m. Review – Preview *
Devotion

Positioning an Organization to Receive Planned Gifts

8:30 a.m. Investment and Custodial Services Guest
Presenter

9:30 a.m. **BREAK**

10:00 a.m. Ministry Endowment Funding *

Communicating Your Case for Support

11:00 a.m. Developing and Communicating Promise in a Case for Support *

Putting Together the Plan Pieces

11:30 a.m. Individual and Group work to build a take-home plan *

12:00 p.m. **LUNCH**

Communicating Your Case for Support *(cont.'d)*

1:00 p.m. Workshops and Legacy Societies *

Putting the Planning Pieces Together *(cont.'d)*

1:30 p.m. Sharing - Plans and Projects

2:50 p.m. Course Evaluations

3:00 p.m. **CLOSING**

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