LCMS Foundation
TODAY | TOMORROW | FOREVER

Agenda

Tuesday

8:15 a.m.	Welcome and Introductions Devotion	*

Christian Stewardship and Gift Planning

9:00 a.m.	**Culture and Perspectives**	*
	Born for Blessings *Bible study* - The Springboard of Being Blessed - The Illusion of Ownership - The Unifying Presence of God's Grace	Possible Guest Instructor
10:15 a.m.	***BREAK***	

Lifetime Plan for Giving Process

10:30 a.m.	**Guide** - LCMS Foundation approach to charitable planning	Guest Counselor
	Survey - ***Lifetime Plan for Giving Journey***	
12:00 p.m.	***LUNCH***	
1:00 p.m.	***Lifetime Plan for Giving Journey*** (cont.'d)	

Helping People Raise their Hands

1:30 p.m.	**Developing a Gift Planning Emphasis for Your Ministry** - In a congregation or with a donor data base	Guest Counselor *
2:30 p.m.	***BREAK***	
2:45 p.m.	**Working with Professional Advisors** **Additional Lifetime and Estate Planning Concerns**	* Guest Counselor
4:15 p.m.	Review and preview; dismissal at 4:30.	

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

Agenda

Wednesday

8:15 a.m. Review – Preview *
Devotions

Building the Best Gift Plans and Blended Gift Plans

8:30 a.m. **Bequest**
Revocable Trust Distribution *
Beneficiary Designation of Contractual Assets
Payable on Death and Transfer on Death Designation
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

3:15 p.m. **Cultural Facts from the Gift Planning Landscape**
Probate, Estate and Financial Factors *
Tax Economics that Affect Charitable Plans

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

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

LCMS Foundation
TODAY | TOMORROW | FOREVER

Agenda

Thursday

8:15 a.m.	Review – Preview Devotion	*

Positioning an Organization to Receive Planned Gifts

8:30 a.m.	**Endowments in God's Word** **Funding the Vision**	*
9:45 a.m.	***BREAK***	
10:00 a.m.	**Investing and Custodial Services**	Investment Staff

Communicating Your Case for Support

11:00 a.m.	**Building Visibility and Awareness for Gift Planning**	*

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

**Philip Meinzen is primary Instructor unless another presenter is indicated.*