



Gift Planning Course Information

The LCMS Foundation's training course focuses on our **"Lifetime Plan for Giving" Gift Planning for Christians** built around The Foundation's core service of planned gifts, organizational endowments and investment accounts.

The LCMS Foundation's **"Lifetime Plan for Giving" Gift Planning Course** lays out a proven approach that prepares attendees to encourage while helping others identify their charitable values. Discover how to guide people to understand related issues and charitable planning that will allow a steward to provide for their family and support beloved ministries. There is ample cultural reason for this:

- ✓ **Learn how you can connect your mission to givers and recipients in a way that will yield results beyond measure.**
 - Well over half of Americans do not have a current will and 92% don't include charity in their will; mostly because they were never asked and they never thought of it.
 - Many churches find it difficult to discuss financial or estate planning as uncomfortable.
 - Readily available messages and tools that reach end users effectively are hard to find

Enjoy our next gift planning training Regionally. Our scheduled training is our three-day course scheduled periodically every year. For our **updated schedule** please see the link [see upcoming courses](#).

Required online registration is at the link ion.org/training-registration/x

This course is backed by the most comprehensive charitable expertise and services available within the LCMS to help God's steward's plan and direct their passion to give to family and ministry.

- ✓ The Course will acquaint you with Biblical foundations related to charitable planning matters.
- ✓ We will review the plans of giving and acquaint you with the most popular methods that people use with Case studies to explore planning strategies in realistic scenarios.
- ✓ Learn about the basics of taxation and administrative property transference.
- ✓ Discuss fundamentals of endowment use in practical terms and biblical rationale for managing long-term property strategically.
- ✓ Explore ways to encourage people to raise their hands and ways to motivate LCMS givers.
- ✓ Explore effective ways to implement gift planning tactics with other participants.

Our gift planning course explores a view of charitable planning **drawn from a Christ-centered biblical perspective** and charitable best practices.

- ✓ **We are seeing the largest transfer of wealth in history, estimated as high as \$59 Trillion!**

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- 80% of baby boomer business owners will sell their family business within this wealth transfer wave.
 - Many people sit on the sidelines, confused on how to plan effectively.
 - There will be unnecessary taxes paid to an increasingly adversarial government
 - Ministry organizations will be passed over in favor of larger charitable organizations with sophisticated gift planning operations that are poised to help donors.
- ✓ **Stewarding assets beyond the offering plate is seldom communicated.**
- Most messages about generosity imply cash and writing checks
 - The average American has only 9% of their total net worth in cash.
 - The other 91% is in another form.
 - Yet, God's Word is full of illustrations about managing wealth as a Christian disciple.
- Materials:

Online FREE REGISTRATION includes the value of a three ring binder valuable of material, noon meals and refreshments for the breaks. **Register today online at ion.org/training-registration/**

- ✓ This Course is customized for ministry leaders and volunteers working in a variety of ministry sizes and settings.

Sample Agenda link here:

https://drive.google.com/file/d/0B-DBoXLiMGS_dTNES1cxbUJPdms/view?usp=sharing

And there's more . . .

Attendees will:

- receive definitions and useful information to understand complex issues in simple ways;
- identify the most common charitable methods donors can use today and for their future;
- review techniques, tools and tax benefits of charitable planning opportunities; and
- explore case scenarios to apply learning and retention.

Attendees will leave with:

- confidence in talking with others about intentional generosity stemming from faith;
- effective processes to serve donors and link them to your mission;
- directions on how to discover interest and implement program initiatives; plus
- understanding of communication opportunities that effectively identify and encourage.

Feel free to contact Philip Meinzen, LCMS Foundation Director of Training at 262-707-4493 or email Philip.meinzen@lfnd.org. You can also call Kathryn Oetting at 314-996-1680 or 800.325.7912 ext. 1680- or email Kathryn.Oetting@lfnd.org ,

Register today online at ion.org/training-registration/ You can also find our 2017 Gift Planning Courses and future programming schedule online at www.lcmsfoundation.org .