

Ryan Ebner

Regional Gift Planner



**Evangelical Lutheran
Church in America**

God's work. Our hands.

Ryan Ebner, Gift Planner





Ryan Ebner, Gift Planner









What was missing?

What was missing?

-Family

What was missing?

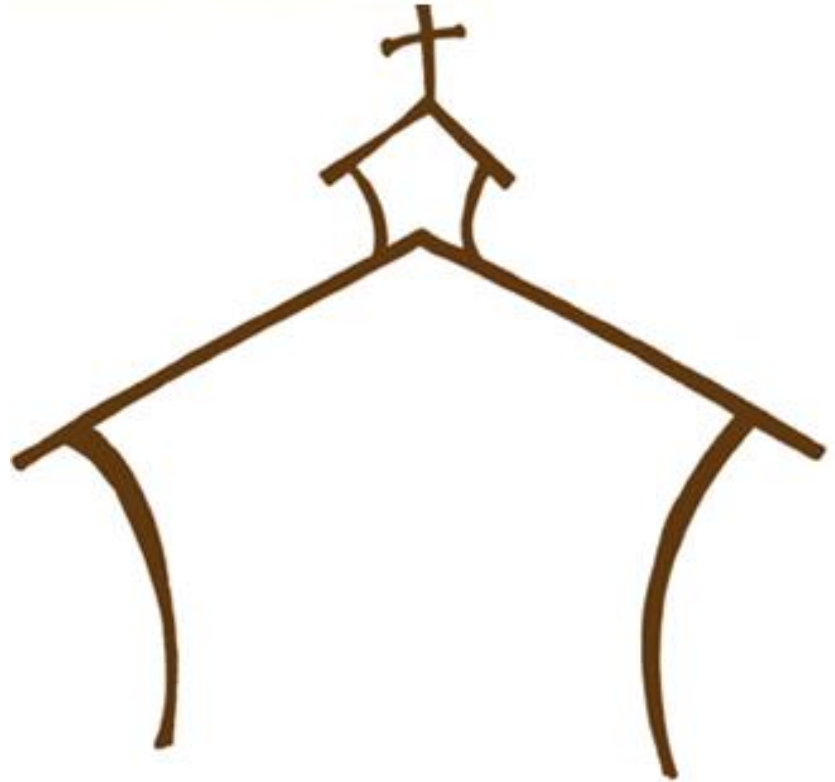
-Family

-Community

Stewardship

“The careful and responsible management of something entrusted in one’s care”

Stewardship
&
LEGACY



Expectations vs Reality





Expectation



Reality



Expectation



Reality



Expectation



Reality



↓
Family

↓
**Ministry
(Charity)**

Expectation



Reality



Reality



Probate



Direct

Reality



Property



**IRA, Pension, 401(k)
Life Insurance
Bank Accounts
Stocks and Bonds
Living Trusts**

Reality

Why is it Important to Have a Gift Plan?

Choose the Best Ways to Give

Direct Bequests (95%)

Through my Will?

Charitable Remainder Trusts

Charitable Gift Annuities

**Qualified Charitable
Distribution**

Donor Advised Funds

Memorial Endowments

**Gifts of Real Estate & Other
Complex Assets**

Gifts of Stock/Securities



Using the Best Assets

What are the best assets to give to your family?

What are the best assets to give to charity?

Is there a difference?

For the Best Beneficiaries



My Gift Plan Will Show me
The Best Ways to Give,
Using the Best Assets,
For the Best Beneficiaries

What is a Gift Plan?

How Do I Make One?



**Your Family &
Loved Ones**



✓ **Your Family & Loved Ones**

✓ **Your Faith Journey –**
the ministries & charities that mean
the most to you



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✓ **Asset Inventory**



Create a Gift Plan

TOTAL ESTATE
\$900,000

**Home & Real
Property**

\$250,000

**Life Insurance
Policies**

\$100,000

**Retirement
Accounts**

\$400,000

Investments

Stocks/ Mutual Funds
CDs, Brokerage Accts

\$100,000

Bank Accounts

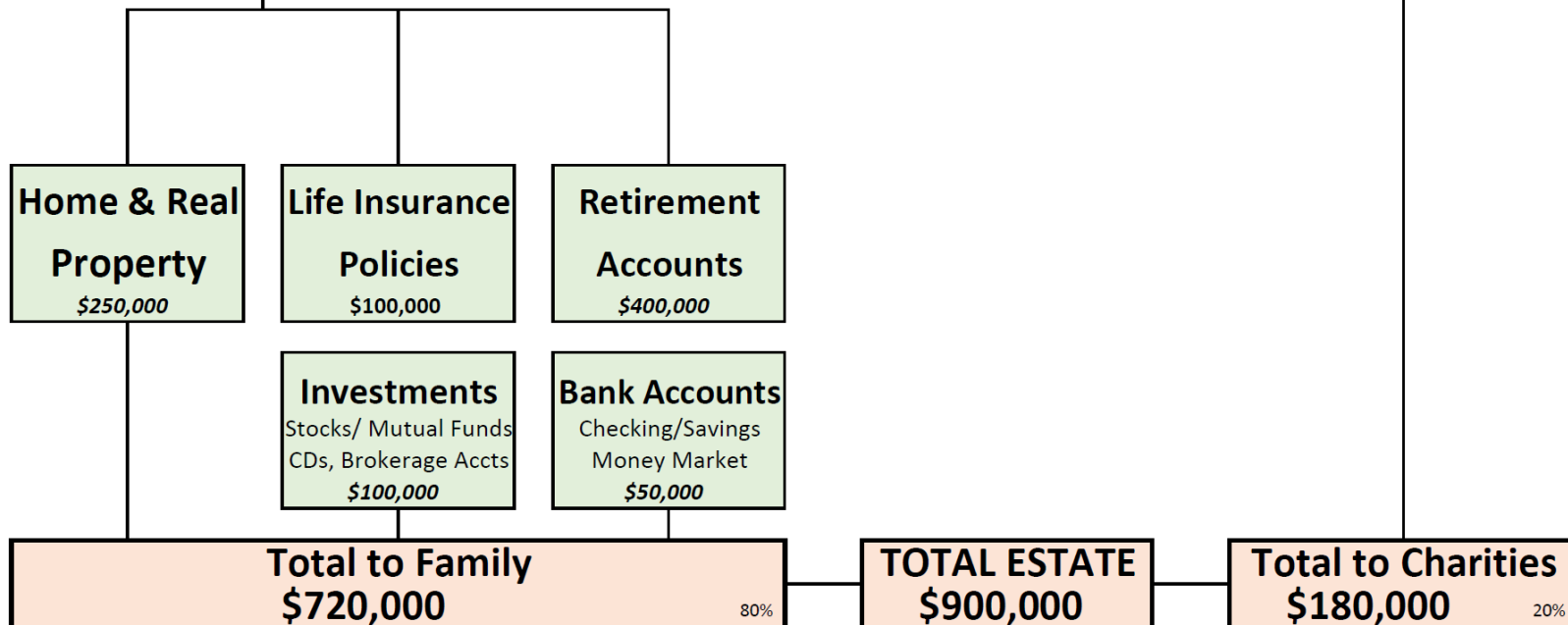
Checking/Savings
Money Market

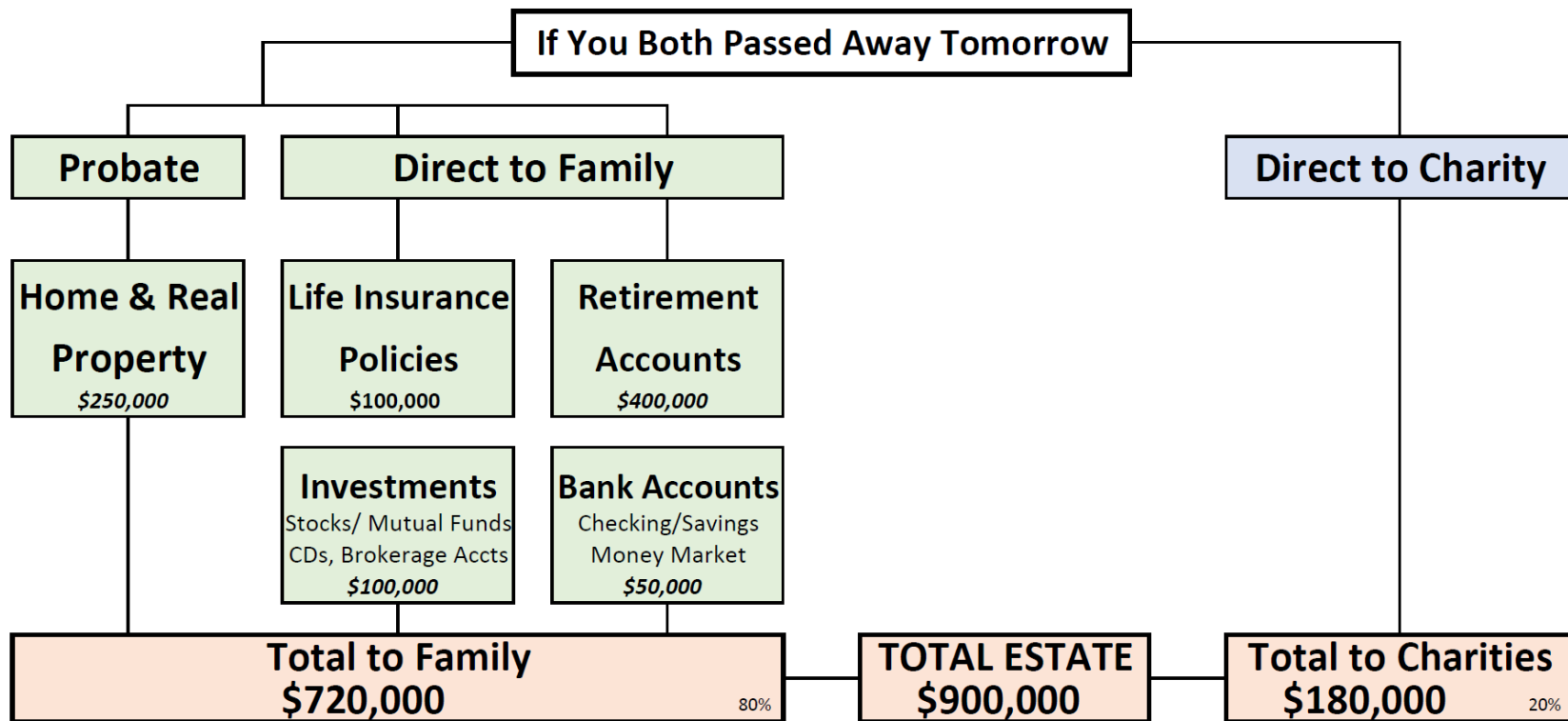
\$50,000

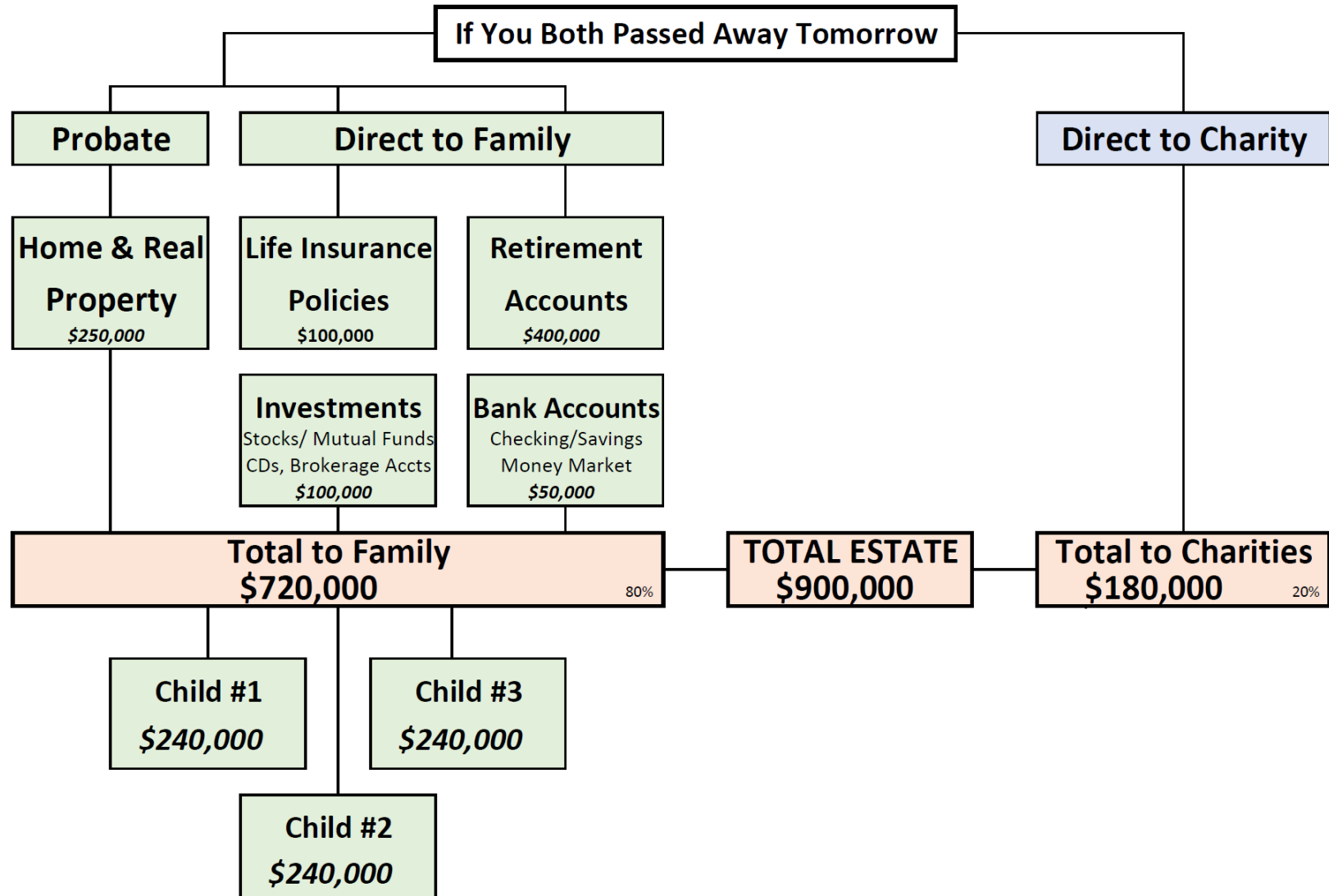
TOTAL ESTATE

\$900,000

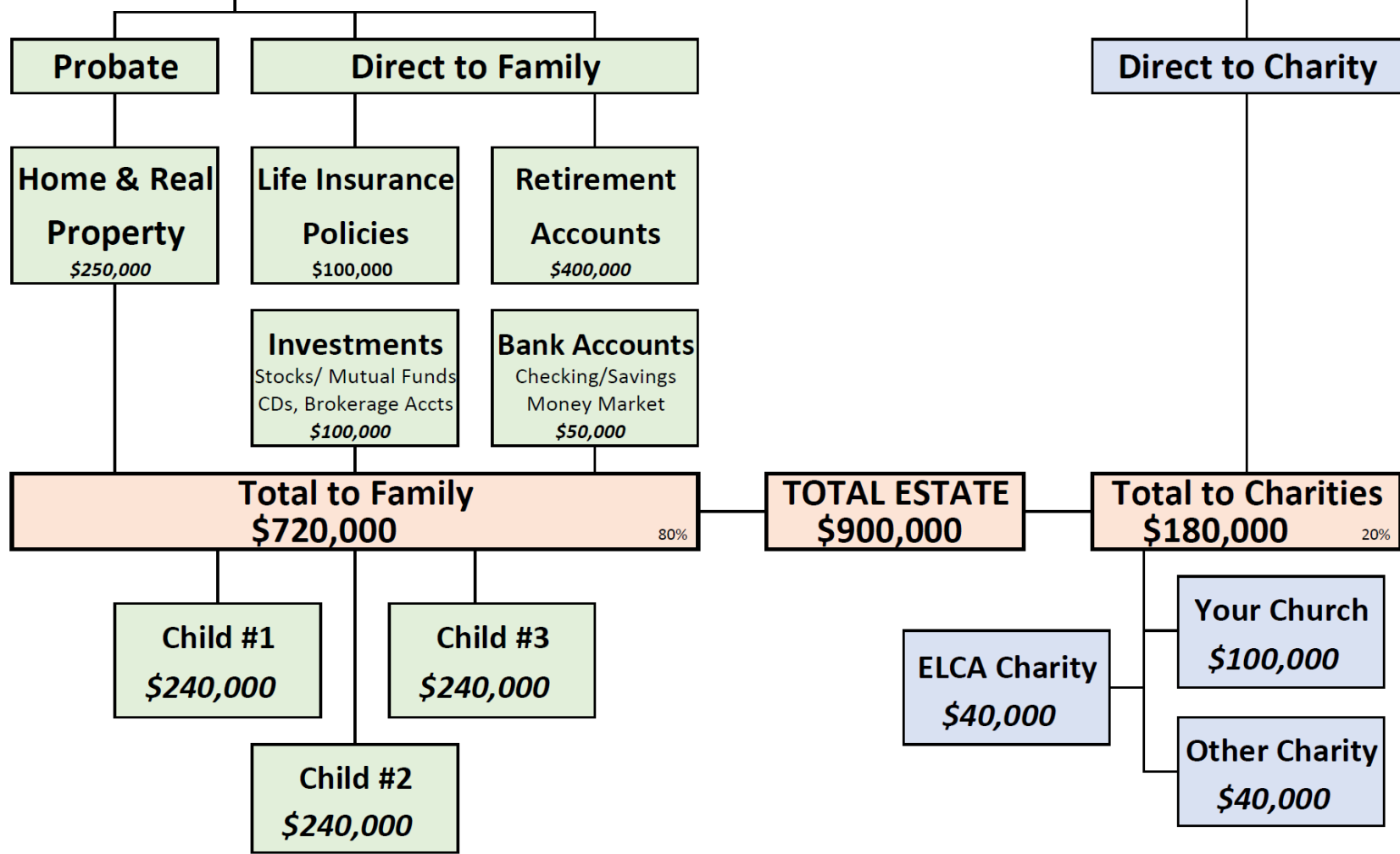
If You Both Passed Away Tomorrow

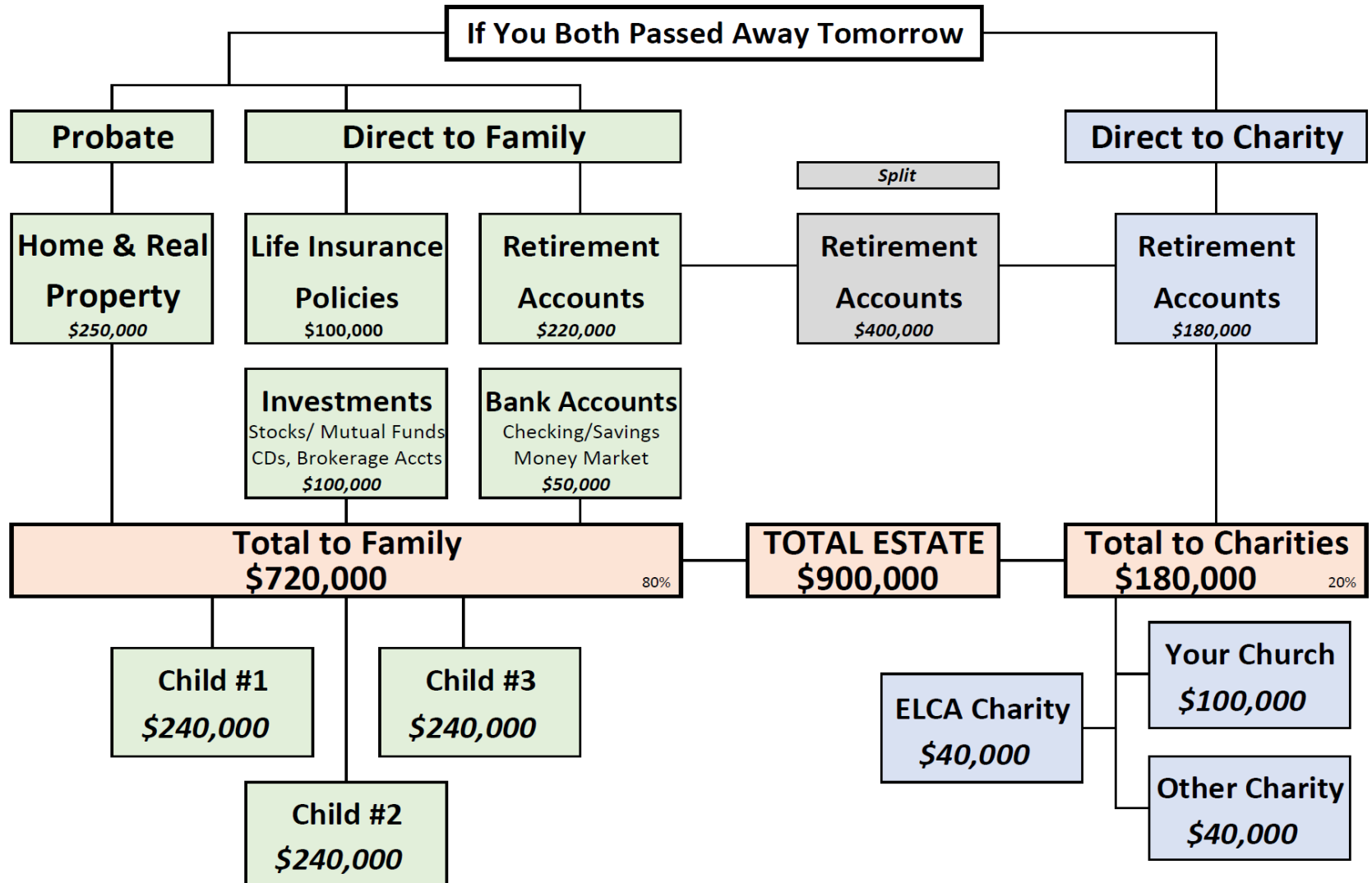






If You Both Passed Away Tomorrow







Create a Gift Plan



Step by Step Instructions

- Help you Complete Paperwork
- Put Plan into Effect



✓ **Create a Gift Plan**

✓ **Step by Step Instructions**

-Help you Complete Paperwork

-Put Plan into Effect

✓ **Gain Assurance**



“I Have a Will”



A Will is only a part of your gift plan!

- Your Will
- Your Assets
- Your Beneficiaries



“I Have a Will”
“Things Change”



You Don't Know When...



“I Have a Will”

“Things Change”

“I Don’t Have Much...”



Everything You Have...



“I Have a Will”

“Things Change”

“I Don’t Have Much...”

“I Haven’t Decided”



- With You on the Journey
- It's Still Your Money!



“I Have a Will”

“Things Change”

“I Don’t Have Much...”

“I Haven’t Decided”

**“I Need to Find an
Attorney First”**



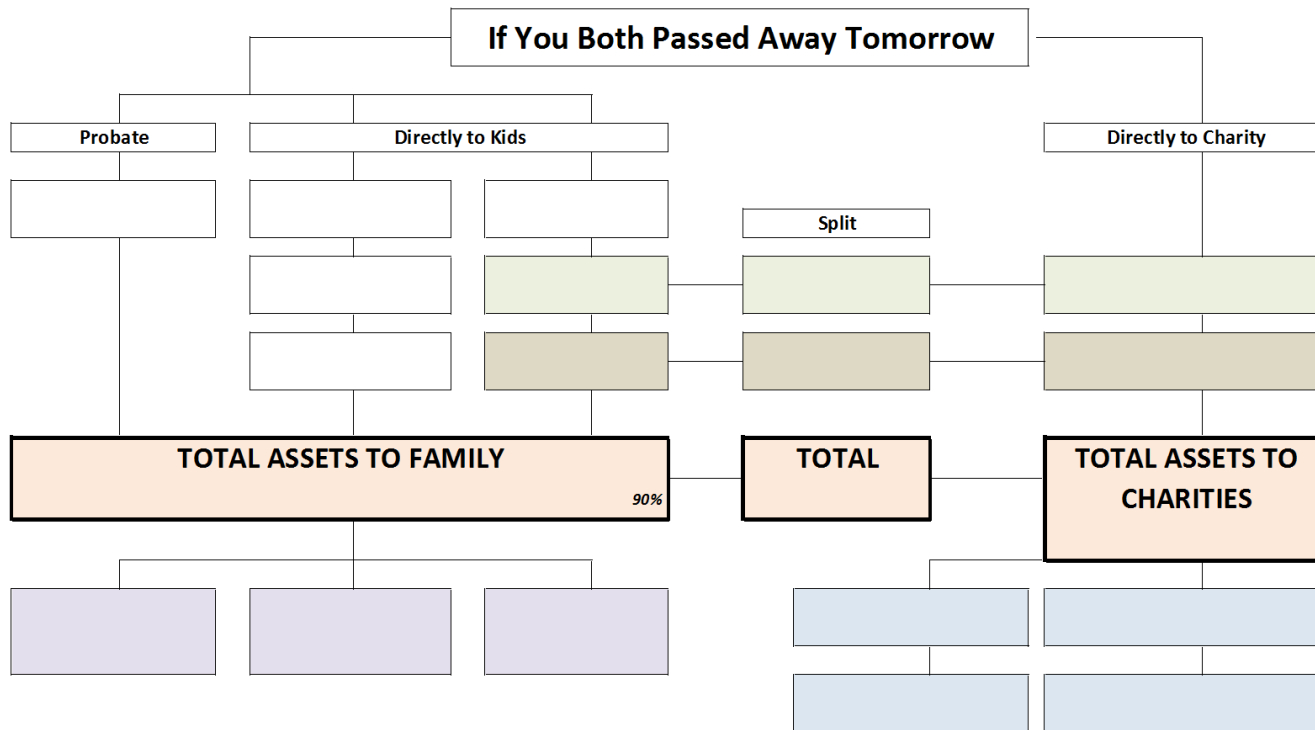
The Three People You Need in Your Estate Plan



- ✓ Explore Your Passions
- ✓ Create a Gift Plan
- ✓ Help Put that Plan into Effect
- ✓ Gain Assurance



What Will Your Boxes Say?





Expectation



Reality



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