



Planned Giving with the ELCA Foundation

Ryan Ebner
Regional Gift Planner



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



The 3-legged Stool of Generosity

1. Current Gifts from income

annual/general fund

2. Major/Special Gifts from income/savings special appeals

3. Planned Gifts from assets

usually the largest gifts at death





What is a Planned Gift?

Any gift, realized now or in the future, that requires more preparation than pulling out your wallet, writing a check, or clicking a button,





A planned gift is...

A thank you note to your past



and a love letter to the future!



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A vertical mosaic artwork on the left side of the slide, depicting a dove with its wings spread, rendered in various colors like yellow, green, blue, and red.

Two Scary Statistics:

1. 68% of American adults have not yet created a will ...even though it's a smart choice for everyone.
2. Fewer than 10% of Americans utilize planned giving ... even though planned giving allows donors to have a greater financial impact than if they give a single gift.



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Why is planned giving important?



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Why is planned giving important?

...Because expectation \neq reality!!



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A good estate plan is better for you and for your loved ones.

- **Provides direction**
 - Your assets will go where you want them to go!
- **Reduces anxiety at an already emotional time**
- **May provide tax advantages for you and your heirs**





A good estate plan is better for you and for your loved ones.

- **Allows you to see the potential impact your giving will have on both family/loved ones and charity**



The worst mistake a person can make in the estate planning process is...



Procrastination
or
Not Planning at All



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What are my options?



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Types of Planned Gifts



Gifts of Appreciated Stock



Donor-Directed Distribution Agreements



Gifts of Real Estate/Commodities



Bequests



Qualified Charitable Distributions





Types of Planned Gifts



Donor Advised Funds



Named Endowment Funds



Charitable Remainder Trusts



Charitable Gift Annuities



That's a lot! How do I choose?



- Now?
- Later?
- Now/Later?
- Income?
- Perpetuity?

You and your gift planner will explore what will work best for YOU!



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Gift Planning with the ELCA Foundation

- Who and what do you love?
- What are your assets?
- What do you need now/future?
- What will your loved ones need?
- What should your will say?
- What beneficiaries should you choose?

**What charities would you like to
support with a planned gift?**





Gift Planning with the ELCA Foundation

Conversation



Illustration



Plan



**WE ARE
BLESSED
TO BE A
BLESSING
TO OTHERS.**



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Gift Planning with the ELCA Foundation

We want every member of the ELCA to consider creating a gift plan for ministry.

- Regional Gift Planners are “beneficiary neutral.”
- Services are provided at no cost.
- We have nothing to sell
- We only go where we’re invited.





Gift Planning with the ELCA Foundation

- **Most planned gifts are completely revocable**
- **Most gift plans are adjustable within donor's lifetime**
- **We want you to feel good about your gift plan.**





Ryan Ebner
Regional Gift Planner
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ryan.ebner@elca.org

814-823-3285

www.foundation.elca.org



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