

# Planned Giving with the ELCA Foundation

Ryan Ebner Regional Gift Planner



### The 3-legged Stool of Generosity

- 1. <u>Current Gifts</u> from income annual/general fund
- 2. <u>Major/Special Gifts from income/savings</u> special appeals
- 3. Planned Gifts from assets

  usually the largest gifts at death

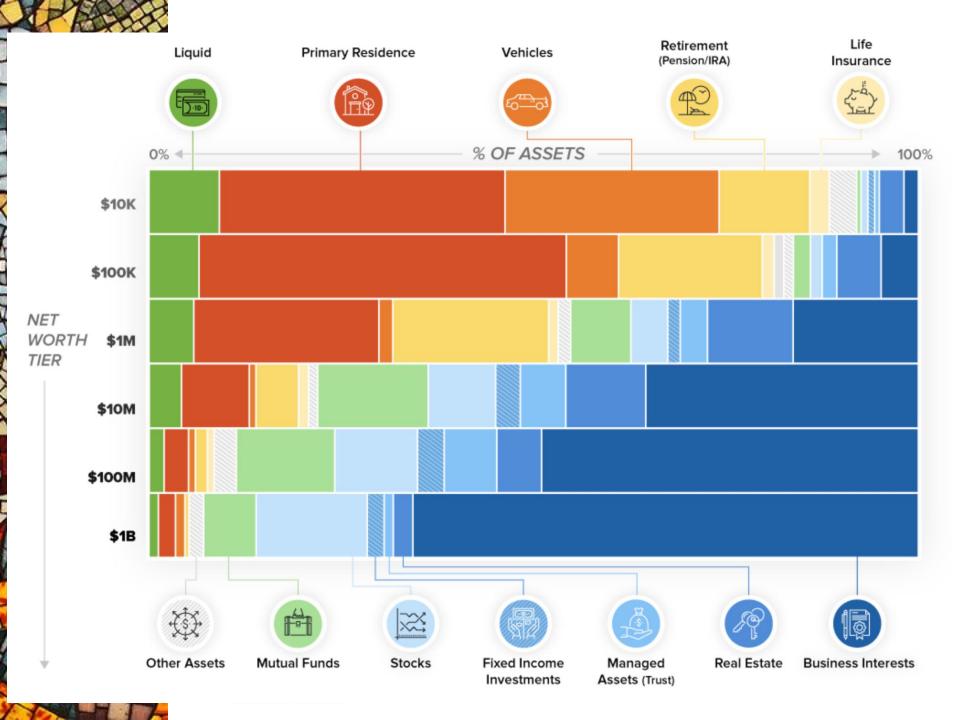




#### What is a Planned Gift?



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!





## **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 that if they give a single gift.





# Why is planned giving important?



# Why is planned giving important?

...Because expectation ≠ reality!!







# 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



## What are my options?





### **Types of Planned Gifts**

- ₩ **G** 
  - **Gifts of Appreciated Stock**
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- **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!





- 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?





#### Conversation









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.





- 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.



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