



Getting Started on Your Gift Plan

Gift planning is the preparation of a plan that considers your blessings, your needs, the needs of your loved ones and your interest in supporting ministry, both now and in the future. Gift planning

empowers you to make decisions that have a larger impact than ever imagined possible. Whether you have much to give or a small amount to share, you can benefit from a gift plan.

Your Assets

At a Glance—Benefits of gifting from your assets

- Can be used in multiple ways
- Can make an impact on ministry immediately or for the long-term
- May provide tax deductions

Assets are anything that you own. You have an opportunity to share your assets with others.

Consider these various items you may own:

- Cash
- Investment accounts like CD's, money market accounts, etc.
- Stocks, Bonds, Mutual Funds
- Retirement Plans
- Insurance
- Personal Property (automobiles, collectibles, heirlooms, etc.)
- Real Estate (residential, recreational, commercial)
- Business Ownership Interests

Assets can be used to make a gift today, providing an immediate impact on the mission and ministry of the Evangelical Lutheran Church in America. Current gifts are tax deductible as allowed by law.

Assets can also be used to make a gift with a long-term impact on the mission and ministry of this church. Whether you are interested in a gift through your will or trust, retirement plans, life insurance, charitable gift annuities, donor advised funds, charitable trusts or endowments, careful gift planning can make an impact forever.

The examples and information provided are for illustrative and educational purposes only and should not be considered tax or legal advice. Please consult with your tax or legal advisor about proceeding with your gift plan.

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