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

SUPPORT YOUR CHURCH AND THE CHARITIES YOU LOVE THROUGH YOUR LEGACY

Through partnership between the ELCA Foundation and your ELCA Synod and regional ministries, free charitable estate planning is available to you.

Have you included a gift to your church in your estate plan?

Do you want to leave a legacy gift to other ministries of our church?

Gift planning services for individuals:

We can help you navigate your options to create a gift plan that benefits the ministries that mean the most to you, while maximizing your financial and estate-planning goals. Options include:

- Facilitation of gifts made through wills, trusts or estates.
- Personalized gift plan illustrations
- Resources specific to your legacy needs.
- Tools that create multiple avenues of approach such as donor-advised funds, named endowment funds, and charitable trusts and annuities.
- Gifts of cash, securities, and real estate
- Qualified Charitable Distributions (QCD) from your qualified retirement accounts.

Your Regional Gift Planner

Stephanie Burke

Mobile: (704) 293-9436

Email: stephanie.burke@elca.org

Stephanie is the gift planner for the members and congregations of the Carolinas through the ELCA Foundation. She is available to assist individuals and couples in creating legacy and estate plans for family and loved ones, the ministries of our church and other non-profit organizations. Contact Stephanie to set up a confidential, no-cost, no-obligation appointment.

Creating Your Personalized Gift Plan

First Meeting

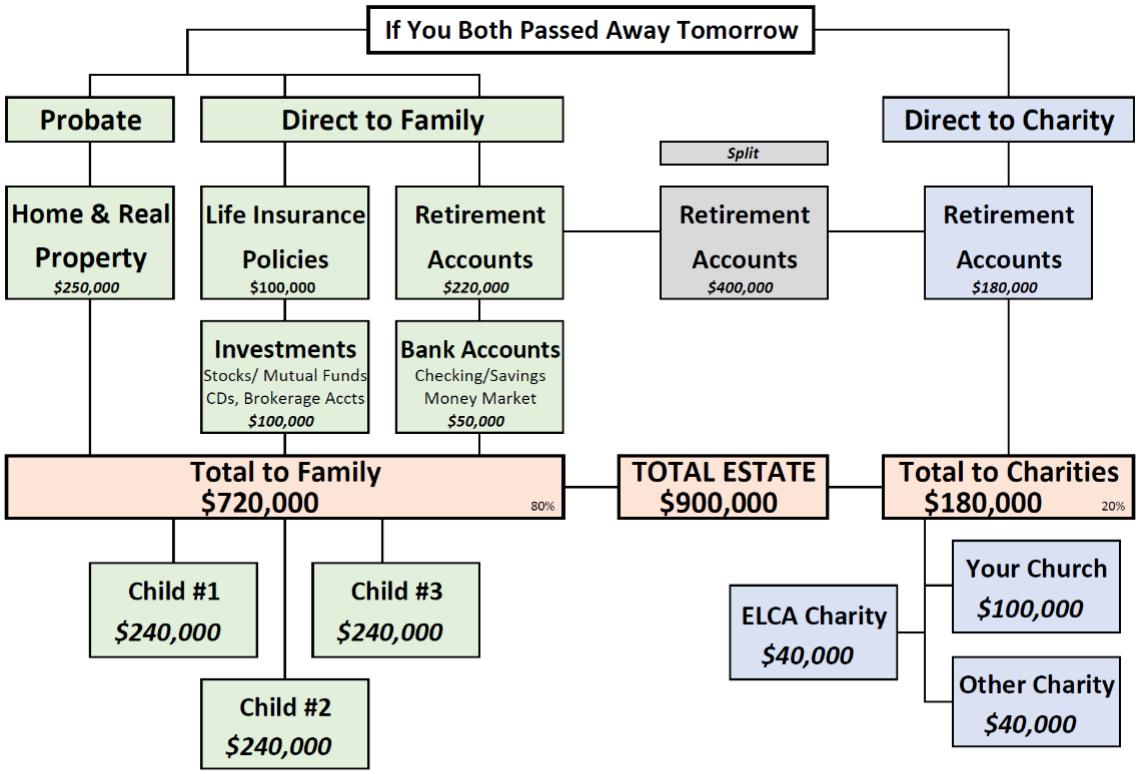
We Talk About Three Things:

- **Family & Loved Ones**
- **Charitable Intent**
- **Asset Inventory**

Second Meeting

-Review Gift Plan Illustration

(Sample Below)



-Confirm Steps to Complete Plan

- Update Beneficiaries on Accounts
- Update/Create Will or Trust
- Determine Other Action Steps