



## **Your Legacy Gift Plan: It STARTS with the HEART**

Because Abel had faith, he offered God a better sacrifice than Cain did.  
God was pleased with him and his gift, and even though Abel is now dead,  
his faith still speaks for him. Hebrews 11:4



**Who Do You LOVE? What Do You BELIEVE?**  
**What is IMPORTANT to You?**

**Take a moment and DREAM of the FUTURE**  
**you'd like to see for your family, your congregation,**  
**the ministries you love...**

**The people you love, the beliefs you cherish,**  
**your values and dreams**  
**are YOUR LEGACY – YOUR WITNESS TO THE WORLD.**

**Your LEGACY LIVES ON BEYOND YOUR LIFETIME.**

**HOW WILL YOU PRESERVE IT?**

- **How will you INVEST in your legacy while you live?**
- **How will you PLAN to PRESERVE your legacy when you die?**

**YOU can TAKE STEPS TODAY to:**

- **Create a Gift Plan that will**
- **Distribute Your Assets**
- **To Bless the People and Ministries You Love**
- **BEYOND your Lifetime.**





## **PEOPLE I LOVE...**

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## **MINISTRIES I CARE ABOUT...**

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## **ASSETS I OWN...**

<b>Asset</b>	<b>Approximate Value</b>
<b>Real Estate</b>	
<b>401k/403b/SEP</b>	
<b>IRAs</b>	
<b>Stocks, Bonds</b>	
<b>Whole Life Insurance</b>	
<b>Savings/CDs</b>	
<b>Other</b>	
<b>TOTAL</b>	



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**Church in America**  
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## **GOD'S WORK** **OUR HANDS**



**During our lifetime, we carry out God's work with our hands. We use our hands to worship and work, to build and beautify, to connect with others and establish friendships, to show companionship, comfort and concern for those we love.**

**YOUR HANDS can PASS ON A LEGACY to bless your loved ones and support the ministries you care about. Through Your Legacy Gift Plan, YOUR HANDS can PASS THE BATON to Hands that will continue God's Work in this World – BEYOND YOUR LIFETIME.**

**Your Regional Gift Planner can help you hand on your values to the future through:**

- **Ministry Funding Strategy with Committees and Boards**
- **Gift Planning Workshops, Temple Talks and Sermons**
- **Gift Planning Meetings with Families**
- **Expertise to Establish and Grow Endowed Funds**

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## **YOUR REGIONAL GIFT PLANNER**



**Yvonne Jones Lembo** serves as a Regional Gift Planner with the ELCA Foundation. With more than 20 years of experience in non-profit development, Yvonne's gift planning expertise has helped families, congregations and ELCA organizations in the Mid-Atlantic harvest more than \$30 million for their stewardship, mission and legacy goals.

Yvonne regards her work as an expression of God's ministry call for her life and an outgrowth of 40 years of ministry and professional experience with congregations and non-profit organizations in the U.S. and abroad. She holds Bachelor's and Master's degrees from Harvard University and received the Master of Divinity with honors from Lutheran Theological Seminary at Philadelphia (LTSP) in 2013. For professional gift planning, Yvonne completed courses in the Certified Estate and Trust Specialist program with the Institute of Business and Finance.

Yvonne has been part of the ELCA since 2006 at Little Zion Lutheran in Telford, PA, St. Mark's Lutheran in Philadelphia and St. Andrews in Dover, DE. Yvonne served with the Development Office of LTSP, now United Lutheran Seminary (ULS), from 2009-2014. As Regional Gift Planner for Delaware-Maryland and Metro DC, she serves the 246 congregations in the DC Metro and DE-MD synods, as well as members of the Lutheran Development Alliance of DE-MD and Metro DC. In the Mid-Atlantic, Yvonne serves on call in Eastern PA, Metro NY, NJ and New England.

In 2018, Yvonne relocated from the hustle and bustle of Philadelphia to the relaxing rural suburbs of Dover, DE. Outside of work, you'll find Yvonne juicing in her kitchen, enjoying her neighborhood, connecting with family and discovering North America on scenic driving jaunts.

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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 adviser about proceeding with your gift plan.

The Evangelical Lutheran Church in America, via the ELCA Foundation, currently does not offer charitable gift annuities to any individuals in Hawaii.

A charitable gift annuity is not regulated by the Oklahoma Insurance Department and is not protected by a guaranty association affiliated with the Oklahoma Insurance Department. Charitable gift annuities are not regulated by and are not under the jurisdiction of the South Dakota Division of Insurance.

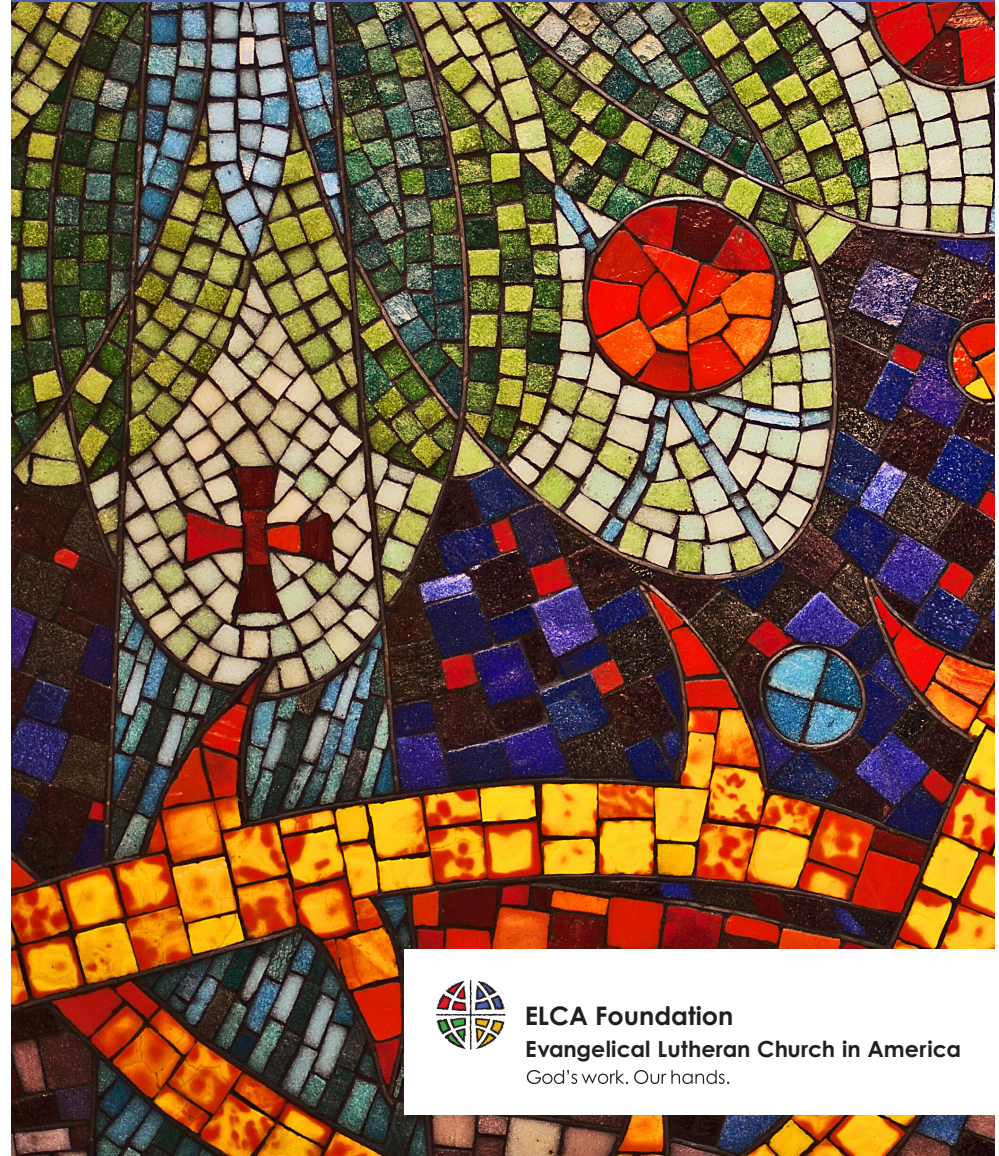
The mosaic artwork shown throughout this brochure is from "Rondel," designed by David J. Hetland of Fargo, N.D. It was commissioned in 1989 for the entrance to the Lutheran Center, the churchwide office of the ELCA in Chicago, Ill.



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# Growing in faith. Growing in giving.

Gift planning options that reflect your life's journey.



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# This church and its ministries mean a lot to you. And they mean a lot to the communities we serve.

The ELCA Foundation is here to help you create your legacy and ensure the continuation of God's work in the world – for years and years to come.

We'll help you with a planned gift that benefits any ELCA ministry, including your congregation, camp, university, seminary, or churchwide ministry, such as ELCA World Hunger, the ELCA Fund for Leaders or Lutheran Disaster Response.

## GIFT PLANNING SERVICES FOR INDIVIDUALS

A planned gift can help you make a more significant gift than you ever thought possible, while at the same time advancing your financial and estate-planning goals. Options include:

- **Gifts made through wills, trusts or estates.**
- **Charitable gift annuities**, which provide fixed payments for life, with the remainder benefiting ministry. Minimum irrevocable gift amount: \$10,000.
- **Charitable remainder trusts**, which provide a stream of income for a term of years or for life. The remainder benefits ministry. Minimum amount: \$100,000.
- **Gifts made from donor-advised funds**, which allow you to direct funds to benefit ministry.
- **Donor-directed distribution agreements**, which provide flexibility on how your gifts are named and where they are distributed, with a maximum number of 10 beneficiaries. Any size gift is welcome.
- **Named endowment funds**, which are established with outright gifts or through other gift vehicles in your name or in memory of a loved one. Minimum gift: \$25,000.
- **Gifts of cash, securities and real estate**, which allow you to make an impact on ministry today.
- **Qualified charitable distributions from your IRA**, which allow you to make a gift to support ministry and save on your taxes.

## EXPERTISE FOR CONGREGATIONS

To help your congregation be an effective partner in planned and major giving, we offer the following assistance with:

- **Mission endowment fund guidance** so congregations can be thoughtful stewards of bequests and planned gifts.
- **Gift planning education** through seminars on wills, estate plans and charitable gift planning.
- **Investment options for endowments** available through the ELCA Endowment Fund Pooled Trust and the Mission Investment Fund of the ELCA. For more information contact the ELCA Foundation.



## Let's continue the conversation.

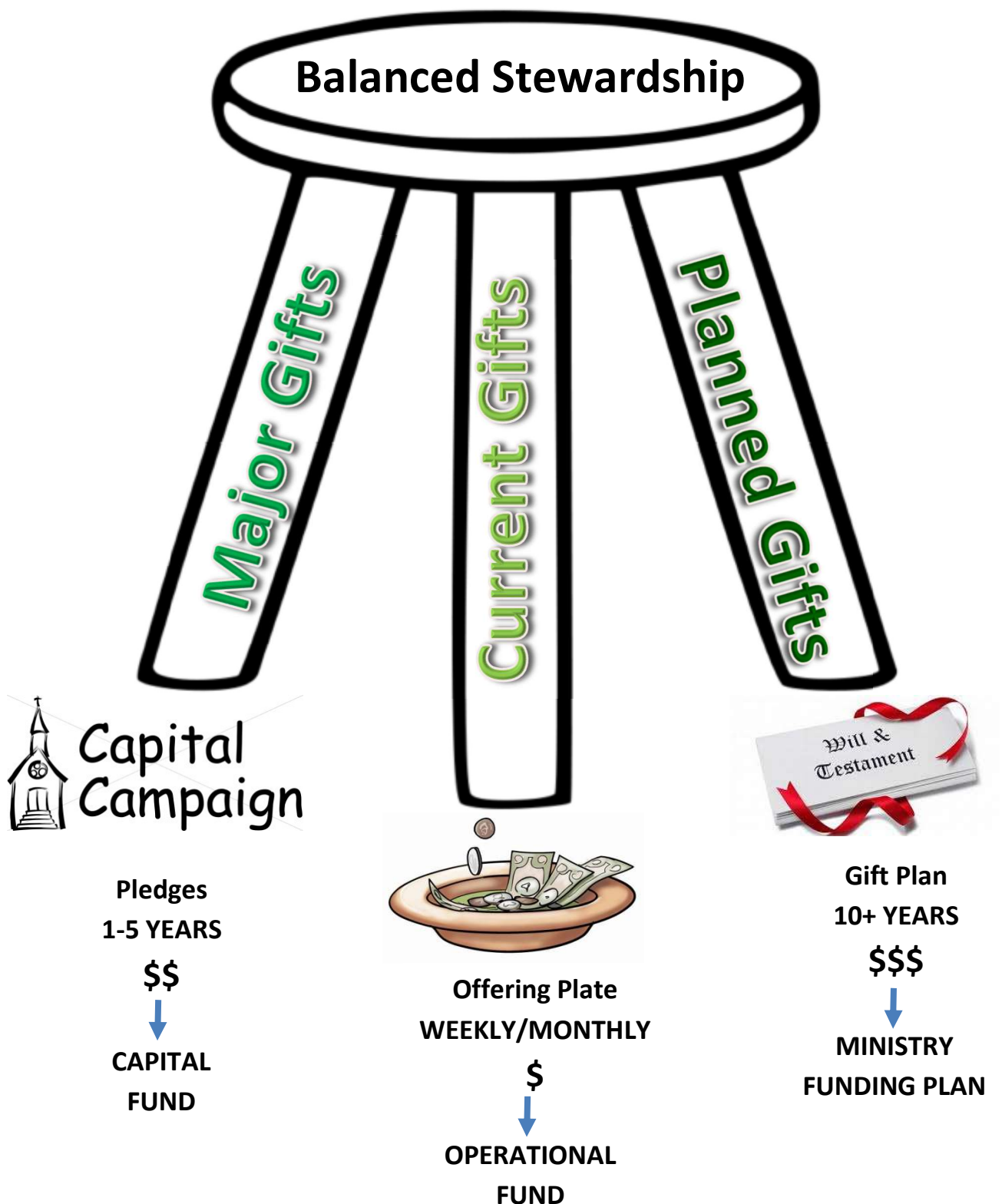
The ELCA Foundation has professional gift planning staff throughout the nation and gift planning tools for every situation. All of our gift planning services are made available to individuals and congregations without obligation. It is our ministry to be of service.

To speak to a gift planner in your region:  
Call us at 800-638-3522  
Email us at [elcafoundation@elca.org](mailto:elcafoundation@elca.org)  
You can also learn more at [ELCA.org/foundation](http://ELCA.org/foundation).





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## **CURRENT GIFTS**

- Monthly Cash Flow
- Can be AUTOMATED
- Consider “bundling current gifts” using
  - ✓ Donor Advised Fund
  - ✓ Qualified Charitable Distribution

## **MAJOR GIFTS**

- Savings/Cash Reserve/Short-Term Investments
- Can be PLEDGED and paid over time (usu. 1-5 years)
- Consider using
  - ✓ Donor Advised Fund
  - ✓ Qualified Charitable Distribution
  - ✓ Appreciated Securities

## **LEGACY GIFTS**

- Long-Term Investments/Lifetime Assets
- PLAN NOW to LEAVE A LEGACY GIFT LATER
- Meet with your Gift Planner to create a comprehensive Gift Plan that may include one or more of these gift tools:
  - ✓ Distribution Agreement
  - ✓ Beneficiary Designation
  - ✓ Charitable Gift Annuity or Charitable Remainder Trust
  - ✓ Endowed Gift
  - ✓ Bequest