



WELCOME!



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Welcome to the fall edition of the WELS Foundation newsletter. We are excited to provide information to you, our valued Foundation partners, to assist you in serving your donors.

This issue contains:

- Endowment spotlight—p. 1
- Wording you can steal—p. 2
- Free endowment media kit—p. 2
- Did you know?—p. 2
- An endowment in action—p. 3
- Ways we can serve you—p. 4

WELS Foundation is here to serve you and your donors. Please reach out to me at any time. May God bless you and your ministry!

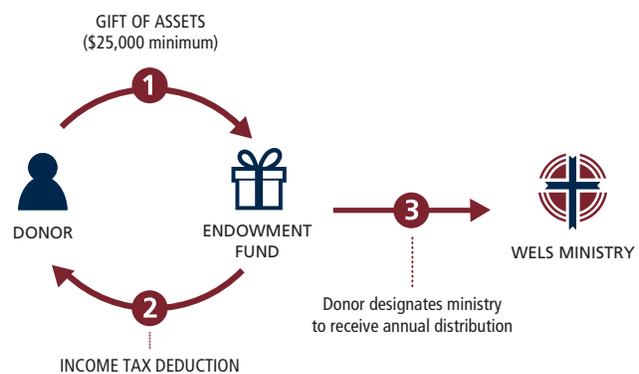
James A. Holm

GIFT SPOTLIGHT: Endowments

Below is an explanation of endowments that your donors may find helpful. [Download a PDF version of this information.](#)

How does an endowment fund work?

- 1 You make a gift of cash, securities, or other property to WELS Foundation. (Additional gifts can be made to the fund at any time.)
- 2 You receive a charitable income tax deduction.
- 3 You designate the ministry that receives annual distributions from the fund.



Is an endowment fund right for you?

- You have at least \$25,000 in cash, securities (stocks, bonds, mutual funds), or other property that you want to give.
- You would like to benefit from potential income tax and capital gains tax benefits.
- You wish to support ministry for years to come.

STEAL THIS WORDING!

You won't get in trouble. We promise.

Endowment funds are kind of like the faithful workhorses of the charitable giving world. They keep plugging away behind the scenes, slow and steady, as the benefits to ministry increase. An endowment is a simple and predictable way for your donors to support your ministry. Another bonus is getting others involved in the joy of giving as they contribute to an already established fund. If you are looking for brief language to promote endowments to your donors, here is wording you can steal and customize:

ENDOWMENTS: *Ongoing, dependable support for ministry*

Did you know that there is a way to provide predictable support for the ministries that you care about, even after you are called home to heaven? Endowments are an ideal way to leave a legacy of faith and also involve others in the joy of giving. They are easy to establish, and once established, they make steady annual distributions to ministry that increase as the fund grows. The benefits increase as additional gifts are made to the endowment, either by you or others.

Would you like to learn more? Please contact _____ at _____ to learn how you can leave a legacy of faith in this way to benefit the ministry of _____.

[Download this endowment wording in a customizable Word document.](#)

FOUNDATION FREEBIE

Endowment fund media kit

Would you like to promote endowments to further support your ministry, but don't want to start from scratch?

WELS Foundation has created an **endowment fund media kit** to help congregations and organizations promote their endowments. The media kit contains customizable communication pieces, graphics, timelines, checklists, and more.

[Access the endowment fund media kit.](#)

Questions? Want help customizing documents? Contact Ann Jahns, WELS Foundation marketing coordinator, at ann.jahns@wels.net or **414-256-3255**.

DID YOU KNOW?

WELS Foundation distributed \$3.5 million through more than 350 endowments this year.

Wow. Our God continues to amaze us.

In 2005, synod convention delegates prayerfully established the WELS endowments to benefit the Lord's work in WELS missions and at our four ministerial education schools. This year, **WELS Foundation was blessed to distribute \$1 million to ministry through these endowments.**

In addition, Foundation also manages endowments that are set up by individuals, congregations, and other WELS ministries. In total, **WELS Foundation distributed \$3.5 million to gospel work from more than 350 endowments this year.**

[Read the full story.](#)

*If your ministry isn't getting endowment fund checks from us, find out why! Contact us at **WELSFoundation@wels.net or 800-752-8940.***

A ENDOWMENT FUND IN ACTION

"We knew we needed to do something with our blessings."

David and Lynette Buss have been long-time supporters of WELS ministry, including their local congregation and area Lutheran high school.

Recently, the Busses knew they wanted to do more to support ministry, out of gratitude to God for his blessings. *"We read an article about Martin Luther College in a flyer from WELS,"* David recalls, *"and we knew we needed to do something with our blessings. We needed to distribute them to people who can use them in the ministry field."*

David contacted Rev. Thomas Mielke, his local WELS Christian giving counselor, to assist in setting up an endowment fund to provide tuition assistance for Martin Luther College (MLC) students.

"David and Lynette have always been supportive of students who study for the ministry," says Rev. Mielke. "They think it's wonderful that students dedicate their lives to teaching and preaching to share the gospel with others. They consider it an honor to help offset rising tuition costs for these students."

The Busses knew that an endowment fund was an ideal way to support MLC students for years to come. "This fund will grow as long as we are

on this earth, and it will continue to grow and help hundreds of students in future years," says David. As more gifts are added to the fund, the distributions will become even greater—as will the blessings to ministry.

The Busses appreciate the one-on-one assistance they received from Rev. Mielke and urge others to take advantage of the benefits of working with a WELS Christian giving counselor.



David & Lynette Buss

Rev. Mielke was privileged to help the Busses with the process, developing a great relationship that will make it easy to work together for future gifts and estate planning. "I've been amazed at how the Lord moves his people

to support ministry. We can't always share the gospel in person, but we can all pray and support others who go to places we are unable to go with the gifts with which God has blessed us," he says.

David agrees: *"This is one way of helping spread the gospel as we reduce tuition costs so pastors, teachers, and staff ministers can continue their work. This will help a lot of different ministry fields—both local ministry and outreach into mission fields as well."*

To make a gift, contact your WELS mission advancement representative or local [WELS Christian giving counselor](#).

WE (STILL) WANT TO HEAR FROM YOU!

Thank you, Russ S., for bravely sending suggestions for the content of this newsletter. Several of Russ' great suggestions will be incorporated into future issues.

Let us know what content you'd like to see in this newsletter. How can we help you serve your donors? We are grateful for your partnership in ministry and are here to serve you.

Send content ideas and suggestions to Ann Jahns at ann.jahns@wels.net or **414-256-3255**.



So that future generations
will know the goodness of God

WELS Foundation is here to help you serve your donors as they support your ministry. We provide the following giving opportunities and services to WELS members and ministries:

Letters of Instruction

Letters of Instruction can facilitate your donors' desire to support your ministry.

- **Simple**—a signed agreement between your donor and WELS Foundation
- **Easy**—enables donors to give to one foundation and then they can have their gifts distributed to your ministry
- **Flexible**—can be changed at any time without changing the donor's will or numerous beneficiary designations
- **No cost**

Processing Gifts

Processing gifts through WELS Foundation can make complex gifts simple and easy.

WELS Foundation can help process:

- Gifts of securities
- IRA qualified charitable distributions
- Real estate
- Life insurance
- Tangible personal property
- Crops or livestock
- Retained life estate
- Closely held stock
- Employee stock options
- Partnership interests

Gifts that Provide an Income

Gifts of cash, securities, and/or real estate can provide a current income stream for your donors and/or their loved ones and a future distribution to your ministry.

WELS Foundation facilitates:

- Charitable gift annuities
 - Immediate payments
 - Deferred payments
 - Flexible deferred payments
- Charitable remainder trusts
 - Charitable remainder unit trusts
 - Charitable remainder annuity trusts
 - Charitable remainder FLIP trusts
- Charitable lead trusts

Legacy Gifts *(made now or after death)*

A legacy gift can provide a source of ongoing financial support for your ministry.

- Donor advised funds
- Endowment funds established by:
 - Individuals or families
 - Congregations
 - WELS ministries

WELS Foundation is the foundation of choice for WELS members and ministries. It is the only foundation whose sole purpose is to facilitate donors' desires to support WELS ministries.