



WELCOME!



Jim Holm, Executive Director
jim.holm@wels.net · 414-256-3206

Welcome to the winter 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:

- Charitable remainder trust spotlight—p. 1
- Wording you can steal—p. 2
- WELS Foundation widget—p. 2
- Did you know?—p. 2
- A charitable remainder trust in action—p. 3
- NEW Helpful Giving Tools web page—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!

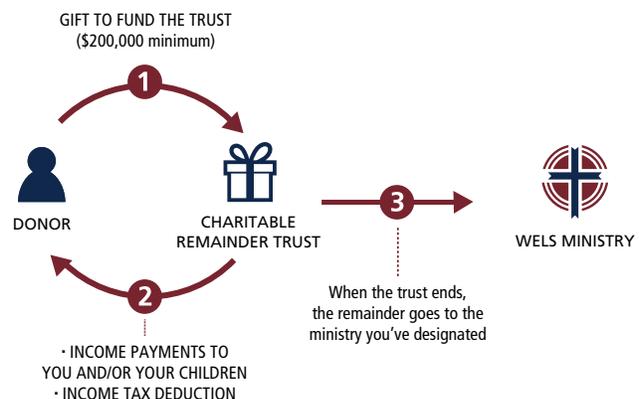
James A. Holm

SPOTLIGHT: Charitable Remainder Trusts

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

How does a charitable remainder trust work?

- 1 You transfer cash, securities, or real estate into a charitable trust.
- 2 The trust provides income payments for life to you and/or the people you care about (like your children). In addition, you receive a charitable income tax deduction.
- 3 When the trust ends, the remainder will go to support the ministry or ministries that are important to you.



Is a charitable remainder trust right for you?

- You have at least \$200,000 of cash, securities, or real estate that can fund the trust.
- You wish to receive income payments for life (for you and/or your children).
- You would like to benefit from potential income tax and capital gains tax benefits.
- You wish to leave a legacy to support ministry after you are called home to heaven.

STEAL THIS WORDING!

You won't get in trouble. We promise.

Charitable remainder trusts are a great giving option for a very specific type of donor, based on the gift amount needed to fund the trust. But the blessings to them and to ministry are tremendous! If you are looking for brief language to promote charitable remainder trusts to your donors, here is wording you can steal and customize:

CHARITABLE REMAINDER TRUSTS: *A tax-wise way of providing for children and church*

Did you know that you can provide for yourself and your family while reducing taxes and supporting the ministries that you love? Charitable remainder trusts provide income to you for life and/or your children for up to 20 years, with the remainder going to support the ministries of your choice after you are in heaven.

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 charitable remainder trust wording in a customizable Word document.](#)

WANT THIS WIDGET?

It's yours!



WELS Foundation
Wisconsin Evangelical Lutheran Synod

HELPFUL RESOURCES

- › Charitable Gift Annuity
- › Charitable Remainder Trust
- › Donor Advised Fund
- › Endowment Funds
- › Learn more

WELS Foundation serves donors and the ministries they support by providing gift administration for charitable remainder trusts, charitable gift annuities, donor advised funds, and endowment funds.

WELS Foundation also processes gifts including real estate, life insurance, and marketable securities.

OUR MISSION

So that future generations will know the goodness of God

After the Israelites crossed the River Jordan, they set up a stone memorial so that future generations would know the goodness of God. WELS Foundation exists to help members whose gifts leave a monument of their faith that will be a blessing for many years to come.

[Grab the coding to add this WELS Foundation widget to the legacy page of your website.](#)

DID YOU KNOW?

WELS Endowment Fund again receives accolade



Council on Foundations—Commonfund
CCSF

For the second year in a row, the WELS Endowment Fund's net investment return **placed in the 90th percentile** of the foundations that participated in the 2020 *Council on Foundations—Commonfund Study of Investment of Endowments for Private and Community Foundations®*.

The investment returns for the WELS Endowment Fund were 22.39% and 21.22% in 2019 and 2020, respectively.

In 2020, WELS Foundation distributed a total of **\$3.5 million** to gospel work from more than **350 endowments**. We praise God for his blessings!

[Read the full story.](#)

[Interested in how an endowment can benefit your ministry? Find out more.](#)

A CHARITABLE REMAINDER TRUST IN ACTION

“The Lord has blessed us beyond anything we ever imagined.”

WELS members Jerry and Lynn Zimpelmann are no strangers to ministry. With three sons serving as pastors, they know how important it is to have God’s people support gospel ministry.

In 2002, when Jerry and Lynn were looking to sell their family business, they had some goals in mind: they wanted income to support them in retirement, and they wanted to support the Lord’s work. The charitable remainder trust they set up through WELS Foundation helped them meet both of those goals.



Jerry & Lynn Zimpelmann

remainder trust perfectly fit their life situation and giving goals.

“I’m 71 years old, and there is a lot more in the rear view mirror now than there is in the windshield,” says Jerry. “I could go on for hours, talking about how the Lord has blessed the kingdom and blessed us beyond anything we ever imagined. The closer you get to the end, the more perspective you have on the Lord’s tapestry for the work he’s had in his kingdom for you, and our charitable remainder trust is a big part of that.”

The income from the trust allowed Jerry and Lynn to retire and provide for something they are very passionate about: WELS mission work, particularly in Mahahual, Mexico. The charitable

To set up a charitable remainder trust, contact your WELS mission advancement representative or local WELS Christian giving counselor.

FOUNDATION FREEBIE

NEW “Helpful Giving Tools” web page

You asked, and we listened! Our new online Helpful Giving Tools page provides the following content to help you serve your donors:

- Letter of Instruction form
- Gifts of Securities procedures document
- Qualified Charitable Distribution procedures document
- Link to the online gift options tool for your donors



Click the image to visit the page.

WE ARE HERE TO SERVE YOU!

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.