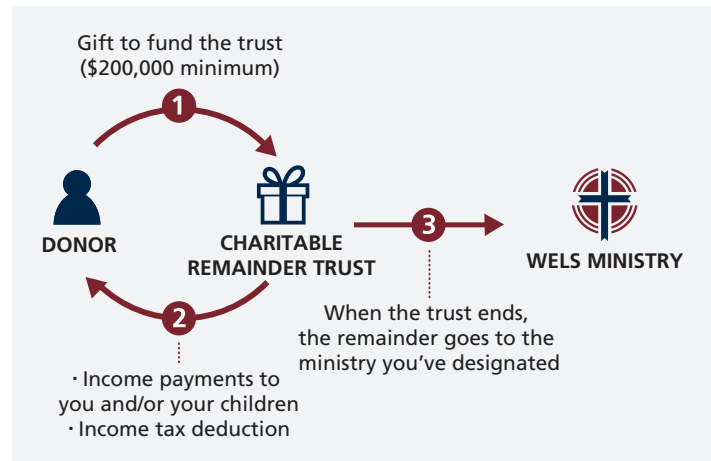


CHARITABLE REMAINDER TRUST

A tax-wise way of providing for you, your children, and ministry

▶ 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?

Let's find out! You...

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

▶ I'm interested! How do I learn more?

Please contact your local WELS Christian giving counselor:

- 800-827-5482
- mcg@wels.net

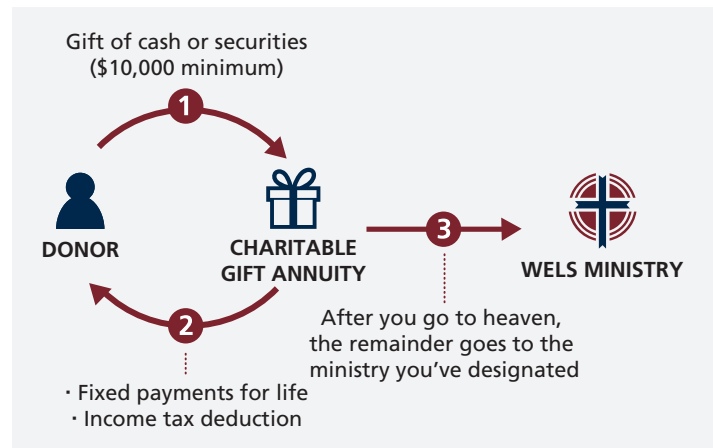
**There are a number of different ways to structure the trust based on your situation.*

CHARITABLE GIFT ANNUITY

A simple gift plan that pays you income for life

▶ How does a **charitable gift annuity** work?

- 1 You make a gift of cash or securities to WELS Foundation.
- 2 You receive fixed income payments for life and a charitable income tax deduction.
- 3 After the Lord calls you home, the remainder is distributed to the ministry or ministries that are important to you.



▶ Is a **charitable gift annuity** right for you?

Let's find out! You...

- ...have at least \$10,000 in cash or securities (stocks, bonds, mutual funds) that you want to give.
- ...wish to receive income payments for life.
- ...would like to benefit from potential income tax and capital gains tax benefits.
- ...wish to leave a legacy to support ministry after you are called home to heaven.

▶ I'm interested! How do I learn more?

Please contact your local WELS Christian giving counselor:

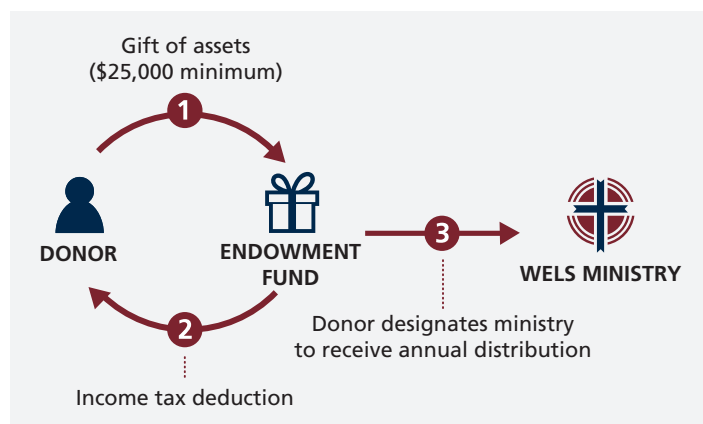
- 800-827-5482
- mcg@wels.net

ENDOWMENT FUND

Ongoing, dependable support for ministry

▶ 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?

Let's find out! You...

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

▶ I'm interested! How do I learn more?

Please contact your local WELS Christian giving counselor:

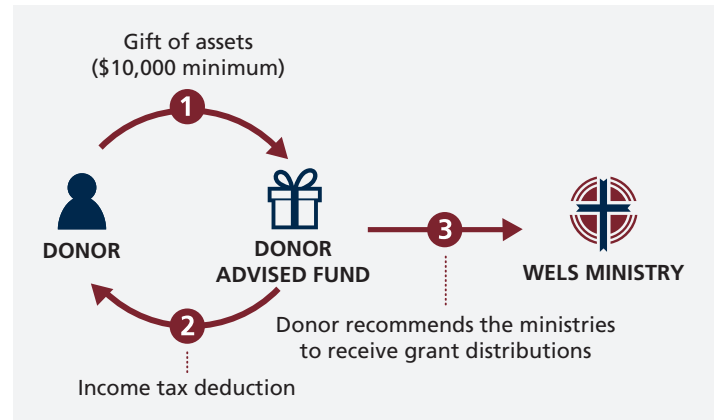
- 800-827-5482
- mcg@wels.net

DONOR ADVISED FUND

A simple, tax-wise way to support ministry

▶ How does a **donor advised 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 recommend the ministry or ministries that receive distributions from the fund.



▶ Is a **donor advised fund** right for you?

Let's find out! You...

- ...have at least \$10,000 in cash, securities (stocks, bonds, mutual funds), or other property that you want to give.
- ...would like to benefit from potential income tax and capital gains tax benefits.
- ...wish to have an immediate impact on the ministry or ministries you recommend.

▶ I'm interested! How do I learn more?

Please contact your local WELS Christian giving counselor:

- 800-827-5482
- mcg@wels.net