



WELS Foundation
Wisconsin Evangelical Lutheran Synod

WELS Association of Lutheran High Schools conference

Mission Advancement sectionals

Thurs., Feb. 29, 2024
Sheraton Hotel, Brookfield, Wis.



Bible Study on Christian Stewardship (9:30-10:30 a.m.)

Rev. Paul Prange, WELS administrator for ministerial education, will lead us in a discussion of biblical stewardship.

Break (10:30-10:45 a.m.)

Session 1: Your Charitable Toolbox by Jordan Richardson from Ren (10:45 a.m.-12:00 p.m.)

As a fundraising professional, you have a plethora of charitable tools in your toolbox. You just need to know how to use them. In this session, Jordan will compare and contrast donor-advised funds (DAFs), charitable remainder trusts (CRTs), and charitable gift annuities (CGAs) and provide practical conversation starters and usages for each charitable tool. Knowing how to use your charitable toolbox can bring immediate value to your next donor conversation.

Conference Lunch (12:00-1:00 p.m.)

Session 2: Case Studies with DAFs, CRTs, and CGAs by Jordan Richardson from Ren (1:00-2:00 p.m.)

Your donors' lives are complex. While considering a gift to your organization, they may also be considering the impact on their financial, tax, and estate planning goals. In this session, we will consider a few donor scenarios and find solutions with DAFs, CRTs, and CGAs that deliver a positive result for the charity while also moving the donor toward accomplishing their financial, tax, and estate planning goals.

Break (2:00-2:15 p.m.)

Mission Advancement Roundtable (2:15-4:00 p.m.)

This roundtable will allow participants to discuss issues and opportunities they are facing in their ministry.

As a Strategic Growth Advisor at Ren, **Jordan Richardson** is dedicated to fostering the growth and success of donor-advised fund programs. He has a decade of experience in financial services and philanthropic planning. He holds a B.A. in Economics and Business Management from Hope College and is recognized as an Accredited Investment Fiduciary (AIF®) and Chartered Advisor in Philanthropy (CAP®). He resides in Des Moines, Iowa, with his wife, Mallory, and dog, Finch.



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