



## WELCOME!



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We are excited to provide information to you, our valued Foundation partners, to assist you in serving your donors.

This issue contains:

- Donor advised fund spotlight—p. 1
- Wording you can steal—p. 2
- NEW WELS Foundation videos for your use—p. 2
- A donor advised fund in action—p. 3
- Free customized folder inserts for donors—p. 3
- Ways we can serve you—back page

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*

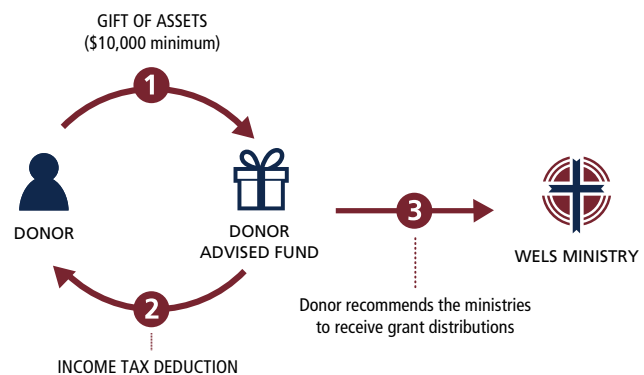
## SPOTLIGHT: Donor Advised Funds

Below is an explanation of donor advised funds that your donors may find helpful.

[Download a PDF of this information.](#)

### 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?

- You have at least \$10,000 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 have an immediate impact on the ministry or ministries you recommend.

## STEAL THIS WORDING!

You won't get in trouble. We promise.

Donor advised funds offer maximum flexibility for donors, plus they can have an immediate impact on ministry. If you are looking for brief language to promote donor advised funds to your donors, here is wording you can steal and customize:

### DONOR ADVISED FUNDS: *One-stop giving*

Did you know there is an efficient and flexible way to establish an ongoing charitable legacy? Through a donor advised fund, you can give a gift now and recommend the ministries that benefit later. Your gift can also be divided among the ministries you care about, and you'll receive a single receipt for income tax purposes. In addition, you can involve family members in the joy of recommending the ministries that benefit from your gift.

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 donor advised fund wording in a customizable Word document.](#)

## 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? Are there resources we can provide?

We are grateful for your partnership in ministry and are here to serve you.

Send content ideas and suggestions to [ann.jahns@wels.net](mailto:ann.jahns@wels.net) or 414-256-3255.

## DID YOU KNOW?

### NEW WELS Foundation videos

WELS Foundation has produced a series of four new videos focused on the following:

- charitable gift annuities
- charitable remainder trusts
- donor advised funds
- endowment funds

Each video provides an overview of the gift, in addition to a donor story and the gift's impact on the ministry the donor supports.

The videos also encourage God's people to reach out to their local Christian giving counselor or mission advancement representative as they consider a planned gift.

You can use these videos as a tool when you connect with donors about ways to support your ministry!

[Access the videos.](#)



## A DONOR ADVISED FUND IN ACTION

“Our prayer is that the donor advised fund is around a lot longer than Bonnie and I are.”

WELS member and attorney David Nommensen and his wife, Bonnie, knew that setting up a donor advised fund was an ideal and tax-wise way to support ministry at their home congregation, First Lutheran in Elkhorn, Wis.

The donor advised fund provides predictable, ongoing support to ministry, helping fund programs both inside and outside the church and school, for the benefit of their members and surrounding community.



David Nommensen

In addition, David and Bonnie know that their family donor advised fund is a wonderful way to involve their kids and grandkids in the joy of giving, since they can be included in the decision-making process for the grant recommendations. It's another way to pass along Christian values to the next

generation of believers.

“Our prayer is that the donor advised fund is around a lot longer than Bonnie and I are,” says David. “And it’s a nice opportunity for us to have these conversations with our children and extended family about the needs of our favorite church organization. I’m really hoping that someday my grandchildren and great-grandchildren will be donating to this fund and having those same conversations.”

*To set up a donor advised fund through WELS Foundation, contact your WELS mission advancement representative or local WELS Christian giving counselor.*

### FOUNDATION FREEBIE

Customized folder “step” inserts for your donors

WELS Foundation has created a series of documents about planned gifts that can be inserted into folders for your donors. The inserts conveniently “step” for maximum impact.

Each insert contains information and an illustration about a different planned gift: charitable remainder trusts, charitable gift annuities, endowment funds, and donor advised funds.

If you would like us to create a set of inserts that are **customized with your logo, brand colors, and contact information**, let us know! We will provide print-ready files you can send to your printer of choice. Contact Ann Jahns at [ann.jahns@wels.net](mailto:ann.jahns@wels.net) or 414-256-3255 to get started.

**CHARITABLE REMAINDER TRUST**

**CHARITABLE GIFT ANNUITY**

**ENDOWMENT FUND**

**DONOR ADVISED FUND**

A simple, tax-wise way to support ministry

▶ **How does a donor advised fund work?**

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- 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](mailto:mcg@wels.net)

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***[Click here to view all four inserts.](#)***



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.