

CAN I MAKE A GIFT IN MEMORY OF SOMEONE?

Gifts of any kind can be made in memory of or in honor of someone or in celebration of an important event.

ARE THERE TAX ADVANTAGES TO GIVING TO THE FUND?

There are tax advantages to making a gift to the fund. The advantages that donors enjoy may depend on the amount and nature of the gift. Donors are encouraged to consult with their accountant or tax advisor. If you do not have someone to help you in this area, the Fund Committee can recommend someone.

WHAT ARE THE BENEFITS OF GIVING TO THE FUND?

- ❖ Create a lasting legacy that allows you to express your faith and gratitude to God.
- ❖ Avoid capital gains by gifting an appreciated asset.
- ❖ Reducing estate taxes equals more dollars going to your heirs.
- ❖ Immediate charitable deductions.
- ❖ Create a possible increase in income to you and your family.
- ❖ Reduce assets subject to probate.
- ❖ Support the ministry of Gloria Dei Lutheran Church in perpetuity.

REQUEST FURTHER INFORMATION

I have reviewed the Endowment brochure and:

___I would like to speak with someone on the Endowment Fund Committee who can provide additional information.

___I would like to give a gift to the Endowment Fund and would like the pastor and/or Endowment Fund member to contact me.

Name_____

Street_____

City_____

State/Zip_____

Home Phone_____

Work Phone_____

Email_____

(Please complete and return by mail or place in the offering plate. All inquiries are treated with complete confidence.)

GLORIA DEI LUTHERAN CHURCH
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Dana Point, CA 92629
(949)493-3414
Email: gloriadei@mygloriadei.org
Website: mygloriadei.org

**GLORIA DEI
LUTHERAN CHURCH
AND PRESCHOOL**



What is your legacy?

**THE ENDOWMENT
FUND**

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The mission of Gloria Dei Lutheran Church and Preschool is to reflect God's hope, which we express through: celebration, connection, and compassion.

WHAT IS THE PURPOSE OF GLORIA DEI'S ENDOWMENT FUND?

The Fund's purpose shall be to receive gifts and bequests to be used to support new or expanded ministries and new or improved facilities for Gloria Dei. The fund exists separate and distinct from the annual operating budget of the church.

HOW ARE THE FUND'S ASSETS USED?

The fund's assets are managed and disbursed according to their intended purposes as determined by the Endowment Committee and approved by the Church Council. The Endowment Fund Committee is appointed by the church council and serves for a two-year term. The Fund is governed according to the bylaws, which are a part of Gloria Dei's Constitution.

WHAT LEGACY WILL YOU LEAVE?

We all desire significance, to lead happy and fulfilled lives. To that end, there's a longing to make a difference—to leave a lasting impact on the people most dear to us. The search for significance and desire to plan for the future leads many to ponder their legacy. What kind of legacy will you leave? A gift to the Gloria Dei Endowment Fund is an easy and tangible way to have a lasting impact on the people and church that mean so much to you. Your gift then reflects our mission of being a place of hope, God's hope that connects generations. A gift to the Fund may also be an effective way to lessen the burden of taxes on your family and on your estate.

HOW DO I MAKE A GIFT TO THE ENDOWMENT FUND?

The Fund is able to receive many forms of gifts and bequests involving almost any kind of asset. A few of the more common ways to give are:

- ❖Cash. Gifts can be made at one time or on a periodic basis.
- ❖Stocks, bonds, and other securities. Gifts of appreciated stocks and bonds (including U.S. Savings Bonds) often

provide significant tax advantages for the donor.

- ❖Tangible personal property—gifts of saleable personal property could include artwork, jewelry and coin collections.
- ❖Trusts. Through a trust you may give to the fund during your lifetime or upon your death.
- ❖Real Estate. Gifts could include homes or remainder interests in real property.
- ❖Wills. You may make a gift to the Fund of any property through your will. This permits you to specify the nature and extent of a gift that will be made upon your death. Without a will, the State will determine how your assets are distributed.
- ❖Life insurance policies. Donors may purchase a new policy or donate an existing policy with the Fund as the owner or beneficiary.
- ❖Retirement plans, IRAs, 401(k)s. The fund's committee will be happy to assist donors with any necessary paperwork.
- ❖Charitable remainder trusts. Substantial gifts can be made to the fund in trust and the donor receives annual cash payments from the trust assets.
- ❖Charitable gift annuity. Donors can create an annuity to provide regular income payments through a sizeable gift to the fund.