



*Discovering Your*

# Lifetime Plan for Giving

## *Survey*

**INSIDE :**

- *The Five "Ps" of Gift Planning*
- *Prioritize your stewardship goals for family and ministry*
- *Thoughtful and thorough measure of your Christian estate gift planning*



LCMSFoundation  
TODAY | TOMORROW | FOREVER

*Prepared for*

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# Introduction

## YOUR LIFETIME PLAN FOR GIVING

...is a spiritual stewardship process divided into four parts. These parts are designed to guide and educate you through the process of Christian estate and gift planning.

### ✓ Part I THE DISCOVERY

### Part II THE PLAN DESIGNS

### Part III THE SUMMARY

### Part IV THE IMPLEMENTATION

## *The* **Five P's** *of the* GIFT PLANNING PROCESS

### PRAYER

Ask for God's guidance in putting together a plan that will *transfer the blessings* entrusted to you on to your family, heirs, friends, and the Lord's work in a way that it will bear fruit that will last.

### PEOPLE\*

Discuss who is in the family and what special considerations or needs to be taken when planning.

### PROPERTY\*

Record the assets that God has entrusted to your care to determine the size of the estate and understand how laws affect your plan.

### PLANS

Talk about the Lifetime Plan for Giving™ that God has placed in your heart for your family and the Lord's work.

### PLANNERS

List others you may need assistance from to complete your plan, such as an attorney, CPA, insurance representative, etc. The LCMS Foundation encourages you to discuss your plan with your attorney, financial advisor and family at any time during the process.

*\*As you prepare for this visit, please complete the People and Property sections as best you can. This reduces the amount of time needed to gather this information during the visit.*



## Why *is a* LIFETIME PLAN FOR GIVING *important?*

**CHRISTIANS UNDERSTAND THEY ARE  
MANAGERS, NOT OWNERS.**

*The earth is the Lord's, and everything in it, the world and all  
who live in it. Psalm 24:1*

**IT DOES NOT MATTER HOW LITTLE  
OR HOW MUCH YOU MANAGE.**

*His master replied, "Well done, good and faithful servant! You have been faithful  
with a few things; I will put you in charge of many things." Matthew 25:21*

**YOUR ATTITUDE AND YOUR MOTIVES DO MATTER.**

*Then he said, "This is what I'll do. I will tear down my barns and build bigger  
ones, and there I will store all my grain and my goods. And I'll say to myself,  
you have plenty of good things laid up for many years. Take life easy; eat,  
drink and be merry." But God said to him, "You fool! This very night your  
life will be demanded from you. Then who will get what you have prepared for  
yourself?" This is how it will be with anyone who stores up things for himself  
but is not rich toward God. Luke 12:18-21*

**GIVING IS TO BE AN INTEGRAL PART OF  
YOUR CHRISTIAN LIFE.**

*"But just as you excel in everything—in faith, in speech, in knowledge, in  
complete earnestness and in your love for us—see that you also excel in this  
grace of giving." 2 Corinthians 8:7*

**THERE ARE ATTRIBUTES AND CHARACTERISTICS OF  
GOD ONE WILL NEVER EXPERIENCE APART FROM  
THE EXPERIENCE AND RELATIONSHIP OF GIVING.**



### **DID YOU KNOW JESUS NEVER HESITATED TO TALK ABOUT MONEY?**

Sixteen of the 38 parables are  
based on how people handle their  
money and possessions.

One of every ten verses in the  
Gospels deals directly with the  
subject of money.

The Bible has 500 verses on  
prayer, less than 500 on faith,  
but more than 2,000 on  
money and possessions!

Dear gracious  
heavenly Father,

We recognize that you are  
the creator of creation and  
thus the owner of creation.  
You have called us to use  
our blessings to serve You  
by serving others.

Today we begin the process  
of putting together a plan.  
This plan will Transfer the  
Blessings entrusted to us on  
to our children, heirs and to  
You, O Lord, which will prove  
to be a blessing for all. Guide  
and direct our thoughts and  
hearts so that what is planned  
will truly bear fruit for Your  
kingdom, fruit that will last.

All this we ask in the name of  
our precious Savior's name,  
**JESUS!**

Amen.

People

Name 1 \_\_\_\_\_

MI \_\_\_\_\_ Last Name \_\_\_\_\_

Title ☐ Mr. ☐ Miss ☐ Mrs. ☐ Ms. ☐ Rev ☐ Dr.

DOB \_\_\_\_\_ SSN \_\_\_\_\_

Name 2 \_\_\_\_\_

MI \_\_\_\_\_ Last Name \_\_\_\_\_

Title ☐ Mr. ☐ Miss ☐ Mrs. ☐ Ms. ☐ Rev ☐ Dr.

DOB \_\_\_\_\_ SSN \_\_\_\_\_

Address \_\_\_\_\_ County \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Primary Phone \_\_\_\_\_  
Secondary Phone \_\_\_\_\_

Primary Email \_\_\_\_\_

Secondary Email \_\_\_\_\_

Occupation 1 \_\_\_\_\_ 2 \_\_\_\_\_

## YOUR CHILDREN

1st Child \_\_\_\_\_

DOB \_\_\_\_\_

Address (if not living at home)  
\_\_\_\_\_

2nd Child \_\_\_\_\_

DOB \_\_\_\_\_

Address (if not living at home)  
\_\_\_\_\_

3rd Child \_\_\_\_\_

DOB \_\_\_\_\_

Address (if not living at home)  
\_\_\_\_\_

4th Child \_\_\_\_\_

DOB \_\_\_\_\_

Address (if not living at home)  
\_\_\_\_\_

5th Child \_\_\_\_\_

DOB \_\_\_\_\_

Address (if not living at home)  
\_\_\_\_\_

6th Child \_\_\_\_\_

DOB \_\_\_\_\_

Address (if not living at home)  
\_\_\_\_\_

## YOUR GRANDCHILDREN

1st Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

2nd Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

3rd Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

4th Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

5th Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

6th Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

7th Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

8th Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

9th Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

10th Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

11th Grandchild \_\_\_\_\_ DOB \_\_\_\_\_ Parents \_\_\_\_\_

Address \_\_\_\_\_

ASSETS		Name 1	Joint	Name 2	Notes
First name or initials >>					
CASH EQUIVALENT	Checking/Savings Accts				
	Money Markets				
	LCEF Savings Plan				
	Other				
INVESTED ASSETS	CDs				
	Mutual Funds				
	Stocks				
	Government Bonds				
	Bond Funds				
	Treasury Bills				
	Credit Union Shares				
	LCEF Plans				
	Other				
QUALIFIED PLANS	Keoghs (401K)				
	TSAs (403B)				
	IRAs				
	Roth IRAs				
	Vested Pension Plan				
	Profit Sharing Plan				
	Annuities				
	CPS CRSP				
	CPS Supplemental				
LIFE INSURANCE	Permanent (whole)				
	Term				
	Universal				
	Second-to-Die				
	CPS Life				
REAL ESTATE	Home				
	Land				
	Vacation Property				
	Rental Property				
	Hunting Property				
	Other				
BUSINESS OWNER-SHIP	Sole Proprietor				
	Partnership L / G				
	Corporation Sub-S / C				
Sub Totals		\$ -	\$ -	\$ -	

## ASSETS (continued)

### PERSONAL PROPERTY

	Name 1	Joint	Name 2	Notes
First name or initials >>				
Car 1				
Car 2				
Car 3				
Recreation Equipment				
Household Furnishings				
Jewelry				
Collectibles				
Antiques				
Other				
<b>Sub Totals</b>	\$ -	\$ -	\$ -	
<b>Grand Total</b>	\$ -			

## LIABILITIES

### MORTGAGES

### LOANS - SECURED

### LOANS - UNSECURED

### LOANS - CO-SIGNER

	Name 1	Joint	Name 2	Notes
First name or initials >>				
Home				
Second Mortgage				
Farm				
Vacation Property				
Business Property				
Other				
Home Improvement				
Vehicles				
Personal				
Life Insurance				
Other				
Bank				
Personal				
Education				
Credit Card				
Other				
<b>Sub Totals</b>	\$ -	\$ -	\$ -	
<b>Grand Total</b>	\$ -			

## CURRENT ESTATE VALUE

	Name 1	Joint	Name 2
First name or initials >>			
<b>Total Assets</b>	\$ -	\$ -	\$ -
<b>Total Liabilities</b>	\$ -	\$ -	\$ -
<b>Sub Total Estate</b>	\$ -	\$ -	\$ -
<b>Grand Total</b>	\$ -		

Do you have any of the following?

**WILL** ☐ Yes ☐ No

Date \_\_\_\_\_ State Signed \_\_\_\_\_

**POWER OF ATTORNEY** ☐ Yes ☐ No

Date \_\_\_\_\_ State Signed \_\_\_\_\_

**REVOCABLE LIVING TRUST** ☐ Yes ☐ No

Date \_\_\_\_\_ State Signed \_\_\_\_\_

**HEALTH CARE DIRECTIVE** ☐ Yes ☐ No

Date \_\_\_\_\_ State Signed \_\_\_\_\_

**CHARITABLE TRUST** ☐ Yes ☐ No

Date \_\_\_\_\_ State Signed \_\_\_\_\_

**GIFT ANNUITY** ☐ Yes ☐ No

Date \_\_\_\_\_ State Signed \_\_\_\_\_

INCOME

RENTAL INCOME

INSURANCE

## Property & Plans

## CURRENT INCOME SOURCES

	Name 1	Name 2
First name or initials >>		
Current Job		
Social Security		
Retirement		
Dividends		
Interest		
Child Support		
Other		
Bonuses		
Disability Insurance		
Long Term Care		
Charity Beneficiary Life Insurance		
Health Insurance		
Medicare Supplement		
Other		
<b>Sub Totals</b>	\$ -	\$ -
<b>Grand Total</b>	\$ -	

*For discussion with your attorney*

Please spend some time thinking about who you would like to

Handle your financial affairs if you become incapable of doing so (Durable Power of Attorney for Financial Affairs/Trustee)?

Name 1 \_\_\_\_\_ Name 2 \_\_\_\_\_ Name 3 \_\_\_\_\_

Make medical decisions for you if you become incapable of doing so (Durable Power of Attorney for Health Care)?

Name 1 \_\_\_\_\_ Name 2 \_\_\_\_\_ Name 3 \_\_\_\_\_

Wind up the affairs of your estate (Personal Representative/Trustee)?

Name 1 \_\_\_\_\_ Name 2 \_\_\_\_\_ Name 3 \_\_\_\_\_

Become guardian of your children?

Name 1 \_\_\_\_\_ Name 2 \_\_\_\_\_ Name 3 \_\_\_\_\_

Home congregation \_\_\_\_\_ Pastor \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

Church activities \_\_\_\_\_

Other volunteer activities \_\_\_\_\_

Ministries and other charities of interest \_\_\_\_\_

Has the LCMS Foundation assisted you with giving to ministry in the past? ☐ Yes (When? \_\_\_\_\_) ☐ No

## STEWARDSHIP GOALS

*It is important to begin your planning knowing where you want to end up. In the following two sections (a and b), please review each statement. Next, either prioritize each statement by number of importance, or check each that apply. Leave blank any statements that do not apply.*

a) While I am living I want to:		
	Name 1	Name 2
First name or initials >>		
Give financially to the Lord's work.		
Establish a ministry gift to provide on-going support for the Lord's work.		
Provide for my family.		
Maintain my standard of living.		
Increase my level of income.		
Minimize my taxes.		
Provide for my retirement.		
Provide for my long-term health care needs.		
Provide an inheritance for my family.		
Provide financial assistance for education of my family.		
Provide a significant gift to ministry for a special project (please describe).		
Provide a significant gift to ministry while maintaining involvement in how the gift is used.		
Diversify the assets in my estate.		
Discontinue or simplify management of some of my assets (please describe).		
Begin distributing at least a portion of my estate to family.		

b) When God calls me home I wish to:		
	Name 1	Name 2
First name or initials >>		
Make a gift to the Lord's work.		
Establish a ministry gift to provide on-going support for the Lord's work.		
Treat family equally when distributing inheritance.		
Distribute inheritance to family in a lump sum.		
Distribute at least a portion of inheritance to family over a period of time rather than all in a lump sum.		
Provide some restrictions on ability to spend inheritance (please describe).		
Provide special care of my family (please describe).		
Express my Christian faith and give encouragement to my family.		
Involve my family in giving to ministry.		
Minimize the cost of my estate settlement.		
Keep my estate settlement private.		
Provide safeguards to ensure my estate is handled appropriately.		
Minimize taxes.		



Title \_\_\_\_\_ First \_\_\_\_\_ Last \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_

Title \_\_\_\_\_ First \_\_\_\_\_ Last \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_

Title \_\_\_\_\_ First \_\_\_\_\_ Last \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_

Title \_\_\_\_\_ First \_\_\_\_\_ Last \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Email \_\_\_\_\_

[illegible]

# Benefits to Ministry

With your support, the next generation will have the opportunity to experience the Gospel with the same impact that affected your spiritual journey. Your Lifetime Plan for Giving provides resources so the ministries you care about can continue and grow. Prayerfully consider your decisions and list those ministries below.

## LOCAL MINISTRIES

These organizations include your congregation, a local Lutheran school, a local chapter of a regional ministry.

## DISTRICT/REGIONAL MINISTRIES

This could include the district-supported and regional ministries such as camps and schools.

## NATIONAL/WORLD-WIDE MINISTRIES

This could include the Synod, Foundation, Lutheran Housing Support, the Seminaries and other ministries.

## THE *next step*

Your Lifetime Plan for Giving process is organized into four parts. The LCMS Foundation will be available to assist you and your advisors at each stage and you are encouraged to include your attorney, financial advisors, and family throughout this process.



### Part I

#### THE DISCOVERY

You have completed the first part, the survey, that measures your current situation and identifies your goals for your Christian estate and gift plan.

### Part II

#### THE PLAN DESIGNS

The LCMS Foundation will prepare a gift proposal that summarizes your charitable goals and recommends specific charitable gifts.

### Part III

#### THE SUMMARY

The LCMS Foundation will prepare a summary of your plan to facilitate the implementation of your Lifetime Plan for Giving.

### Part IV

#### THE IMPLEMENTATION

Your attorney will prepare or update your estate planning documents as needed to complete your Lifetime Plan for Giving.



**Strategic Endowment Investing, Christian Gift Planning, Charitable Gift Administration.**

*Contact us today to learn more.*

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800-325-7912 | [www.LCMSFoundation.org](http://www.LCMSFoundation.org)

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