LCMS Foundation
TODAY | TOMORROW | FOREVER

Agenda

Tuesday	Topic	Presenters
8:00 a.m.	Welcome and Introductions	*
	Devotions	Rev. Phil Krupski

Christian Stewardship and Gift Planning

8:45 a.m.	Born for Blessings Bible study - The Springboard of Being Blessed - The Illusion of Ownership - The Unifying Presence of God's Grace	Rev. Phil Krupski
9:45 a.m.	Culture and Perspectives	*
10:15 a.m.	BREAK	

Lifetime Plan for Giving Process

10:30 a.m.	Guide - LCMS Foundation approach to charitable planning Survey - Lifetime Plan for Giving Journey	*
12:00 p.m.	LUNCH	
1:00 p.m.	Exploring Conversations in the Lifetime Plan for Giving Journey	*

Helping People Raise their Hands

		*
1:30 p.m.	Developing a Gift Planning Emphasis for Your Ministry - Transfer the Blessings Emphasis for Congregations - Alternative Models that Work - Building the Infrastructure within Organizations	Rev. Phil Krupski
2:30 p.m.	BREAK	*
2:45 p.m.	Working Effectively with Professional Advisors Issues & Concerns with Lifetime Planning for Christian Stewards	
4:15 p.m.	Review and preview; dismissal at 4:30	

**Philip Meinzen is primary Instructor unless another presenter is indicated*

Lifetime Plan for Giving Training

1333 S. KIRKWOOD ROAD | ST. LOUIS, MO 63122-7295
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Wednesday	Topic	Presenters
8:00 a.m.	Review - Preview Devotions	*

Building the Best Gift Plans and Blended Gift Plans with Case Studies

8:30 a.m.	Revocable Gift Plans: - Will Bequests and Revocable Trust Distributions - Beneficiary Designations of Contractual Assets - Payable on Death and Transfer on Death Designations	*
	Life Insurance Gifts	
10:15 a.m.	BREAK	
10:30 a.m.	Charitable Gift Annuity	
	Charitable Remainder Trust	*
12:00 p.m.	LUNCH	
1:00 p.m.	Donor Advised Fund	*
	Personal Endowment Fund	
2:15 p.m.	BREAK	
2:30 p.m.	IRA Rollover	
	Securities and Appreciated Assets	*
	Accepting, Counting and Processing Gifts	

Context for Charitable Planning and Taxation

3:00 p.m.	Cultural Facts from the Gift Planning Landscape	*
	Probate, Estate and Financial Planning Context	
	Tax Economics that Affect Charitable Planning	
4:20 p.m.	Review; field application; dismissal at 4:30.	

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Thursday	Topic	Presenters
8:00 a.m.	Review - Preview Devotions	*
Positioning an Organization to Receive Planned Gifts		
8:30 a.m.	Investment and Custodial Services	Guest Presenter
9:30 a.m.	BREAK	
10:00 a.m.	Ministry Endowment Funding	*
Communicating Your Case for Support		
11:00 a.m.	Developing and Communicating Promise in a Case for Support	*
Putting Together the Plan Pieces		
11:30 a.m.	Individual and Group work to build a take-home plan	*
12:00 p.m.	LUNCH	
Communicating Your Case for Support (cont.'d)		
1:00 p.m.	Workshops and Legacy Societies	*
Putting the Planning Pieces Together (cont.'d)		*
1:30 p.m.	Sharing - Plans and Projects	
2:50 p.m.	Course Evaluations	
3:00 p.m.	CLOSING	

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