



How can you empower
your congregation to
be a blessing for
generations to come?

Transfer the Blessings

The  FOUNDATION®

Linking Christians with Giving Opportunities



Transfer the Blessings

*“... to do good, to be
rich in good deeds
and to be generous
and willing to share
... so that they may
take hold of the life
that is truly life.”*

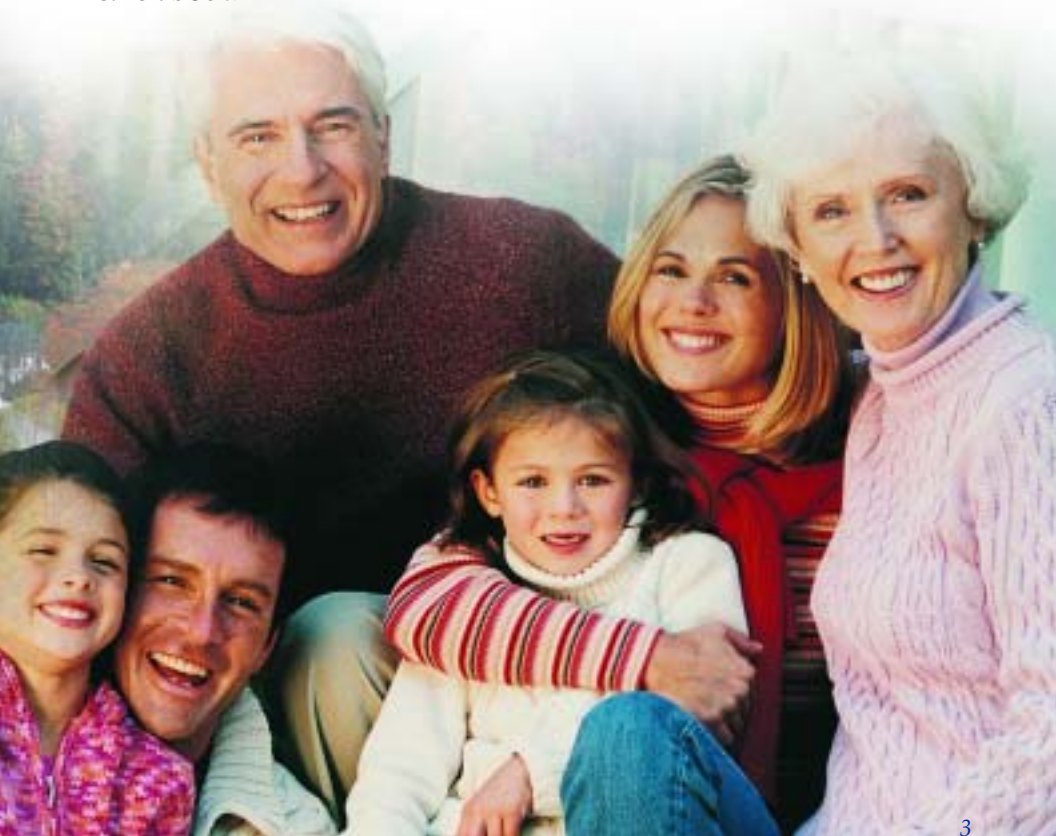
1 Timothy 6:18-19



God has given to each baptized Christian eternal life, created to be in HIS likeness. As children of a giving God, we too are giving people. He has placed a **Lifetime Plan for Giving™** in each Christian's heart. We are not about building bigger barns for ourselves, rather we are called to build ways to *Transfer the Blessings* on to others.

God has called us to be stewards of His creation. The LCMS Foundation has created *Transfer the Blessings* to equip congregational members to be good stewards, strengthening the mission of His church for generations to come.

This unique opportunity from the Foundation's gift planning department trains and equips volunteers to serve as congregational gift planners to assist members with their **Lifetime Plan for Giving™** to the families and the ministries they care about.



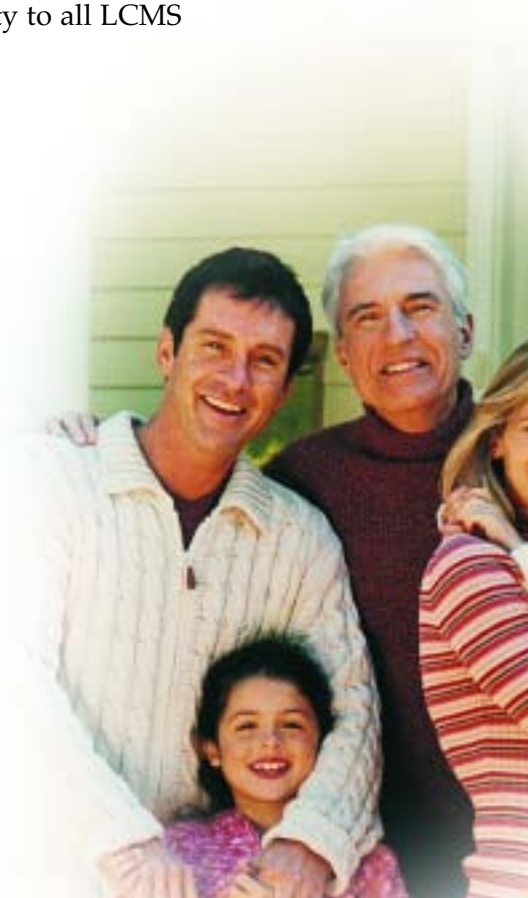
Why Transfer the Blessings?

The LCMS Foundation district gift planning counselors strive to meet the needs of LCMS families. Currently, one gift planning counselor serves the congregations within each district. Each counselor serves about 150 families annually. Within a district with more than 100,000 members, this disproportion creates a relationship gap with little opportunity to reach more members.

Congregational members are often unaware of the gift planning process available to them. The LCMS Foundation is eager to extend this opportunity to all LCMS congregations.

“Next to introducing a person to Jesus Christ and the redemptive work that He has done on their behalf, helping people learn the joy of giving is the best thing that can be done for a person’s walk with the Risen Lord!”

Philip Meitzen, President
Concordia Center for
Financial Leadership, Inc.



How Do You Get Transfer the Blessings Started?

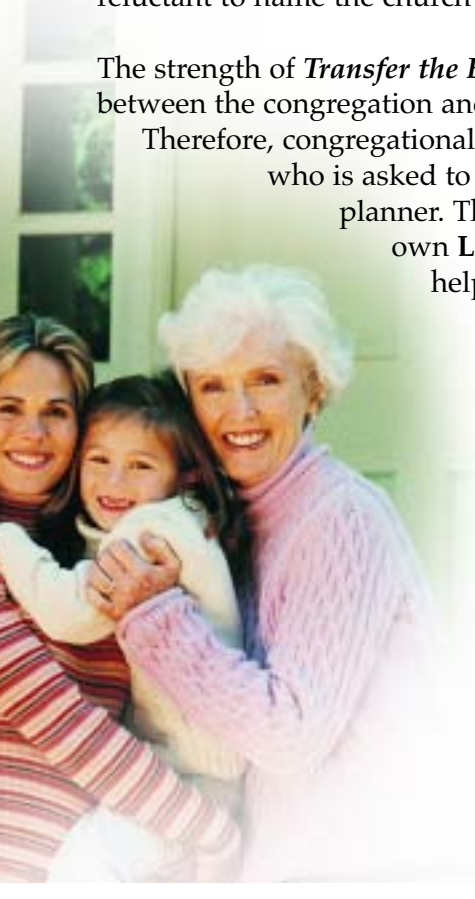
The goal of *Transfer the Blessings* is to assist congregational members with their **Lifetime Plan for Giving™**. However, a congregation needs organization and leadership to support the program.

A congregation must have a vehicle, such as an endowment fund, to organize the further growth of the church, its ministries and stewardship opportunities. Without such a vehicle, difficult issues may surface. The church may lack foresight to perpetually fund ministries, thus stalling its mission. Or, members might be reluctant to name the church as a beneficiary in their plan.

The strength of *Transfer the Blessings* is found in the relationship between the congregation and the commissioned volunteer.

Therefore, congregational leaders will prayerfully consider who is asked to be the volunteer congregational gift planner. The volunteer will complete his or her own **Lifetime Plan for Giving™** before helping others with their plan.

Transfer the Blessings engages the congregation through teaching the LCMS stewardship principles. The volunteer gift planner incorporates these principles in Foundation-provided presentations, bulletin inserts, newsletter articles, and other promotional materials.



How Does Transfer the Blessings Work?

Transfer the Blessings helps create relationships between members, congregations and The LCMS Foundation.

A congregational gift planning team, the district counselor and the entire LCMS Foundation will support the volunteer gift planners. In turn, the volunteer will help congregational members accomplish their own **Lifetime Plan for Giving™**.

The volunteer congregational gift planner's primary resource is the district gift planning counselor who provides experience, knowledge and mentoring. The LCMS Foundation provides additional support through:

Senior Vice President of Gift Planning Services

- Manages all of gift planning
- Builds relationship with ministries
- Coaches and encourages gift planners

Manager of Gift Planning Services

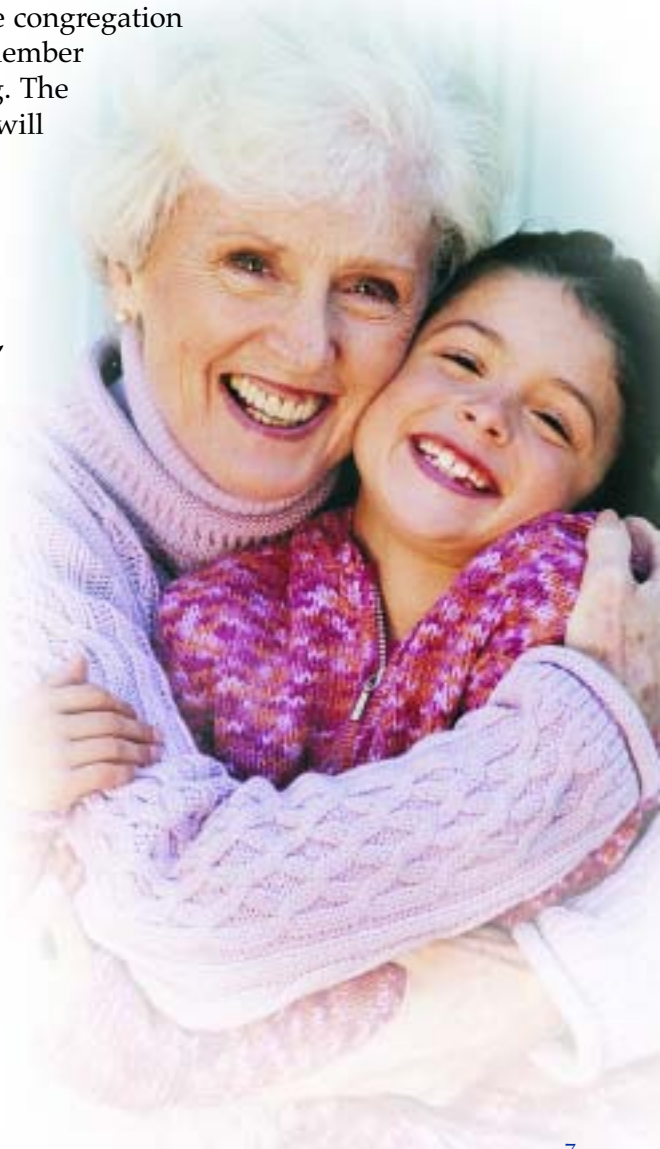
- Coordinates training
- Facilitates congregational programs headed by the gift planner
- Develops/distributes manuals, presentations, newsletter articles, etc.

Backroom Support Staff

- Attorneys
- Trust officers
- Gift processing and reporting

Volunteer gift planners will receive training and mentoring from the district gift planning counselor and The LCMS Foundation. The congregation will benefit having a member trained in gift planning. The volunteer gift planner will help bring the many services of the LCMS Foundation to the congregation.

The LCMS Foundation, including the district gift planning counselor, backroom staff and management, will provide the volunteer with the tools and support necessary for the position.



What Steps are Needed to Establish Transfer the Blessings in a Congregation?

Transfer the Blessings involves several cooperative steps between a congregation, the volunteer gift planner and the LCMS Foundation.

1. Establish a congregational support structure involving the pastor, committee members, and school principal/DCE.
2. Review (or establish) the congregational endowment fund bylaws/resolutions to receive and distribute gifts to ministry.
3. Form a *Transfer the Blessings* team that includes two or three lay people and attend a two-day training session hosted by the district.
4. Select the volunteer gift planner from the team.
5. Commission the volunteer gift planner by the congregation.



“The training in Milwaukee for the congregational gift planners was a tremendous success. It was a joy to watch the training unfold and the Ministry Action Teams and congregational gift planners understand what their role is to be. I am proud to be a part of that team and the entire team of The LCMS Foundation.”

John Meyer

South Wisconsin District, Gift Planning Counselor



A two-day training session introduces the team to the gift planning process through:

- 1. Understanding Stewardship:** Basis for *Transfer the Blessings*.
- 2. Establishing a Congregational Gift Planner:** Steps, formalities, and expectations of volunteers.
- 3. Preparing for Service:** Gift instruments, the LCMS Foundation services, websites, and promotion strategies.
- 4. Building the Relationship:** Making contacts through promotional responses and presentations.
- 5. Discovering the Lifetime Plan for Giving™:** Conducting interviews and gathering information.
- 6. Planning Solutions:** Documents and procedures for **Lifetime Plans for Giving™**.
- 7. Completing the Lifetime Plan for Giving™:** Establishing **Lifetime Plans for Giving™** and acknowledging the gift.

The LCMS Foundation Promise and Services

The LCMS Foundation is the only LCMS organization that offers comprehensive charitable expertise and services to help members plan and direct their passion for giving to family and all ministries of the church today, tomorrow and forever.

The LCMS Foundation helps Christians create their own **Lifetime Plans for Giving™** through our experienced gift planning specialists. Every year, we help thousands of faithful donors provide for their families and support hundreds of Lutheran ministries.

Services Offered to Congregations

The LCMS Foundation can help congregations make important financial decisions. A congregational endowment fund may be an important step to consider. We can help establish, promote, grow and manage a congregational endowment fund.

The LCMS Foundation acts as custodian for congregations, colleges, seminaries, auxiliaries, and other recognized service organizations of The Lutheran Church—Missouri Synod. Several investment funds have been established to provide a wide array of investment opportunities that can meet the needs of various investment goals and timelines. Currently, the Foundation manages \$22.1 million in congregational endowment funds.

The investment made in a congregation's endowment fund will perpetually serve God's people.

Services Offered to Members

The LCMS Foundation helps members provide for the people they love and ministries they care about! Each year, our experienced gift planning professionals help Christians support a variety of ministries through:

- Gift Annuities
- Direct Gifts
- Wills
- Donor Advised Family Gift Funds
- Endowments
- Trusts

The LCMS Foundation helps members understand tax benefits and establish gifts consistent with their personal goals. We assist with gift development letters and annual gift campaigns. We help establish endowments and manage assets. Our trust services department administers charitable trusts, pooled funds and gift annuities.

Visit our web site at www.LCMSGiftPlan.org to learn more about our gift planning services available for your congregation. We also invite you to sign up for our two free weekly e-newsletters featuring information on senior issues and current law changes relevant to estate planning professionals.

Benefits to Ministry



Since 1958, the LCMS Foundation has helped fellow Christians, congregations and LCMS organizations achieve financial and ministry goals. In 2005, the Foundation assisted Christians in supporting the Lord's work through more than 190,000 gifts to 595 ministries. These gifts provide more than \$63.1 million in direct and

matured gifts today as well as more than \$45.9 million in managed charitable gifts that will be distributed in the future.

Congregations and members can use their God-given resources to strengthen any ministry, including:

- Their own congregation
- A district ministry
- An LCMS school, college or seminary
- An LCMS recognized service organization
- Special ministries like:
 - LCMS World Relief/Human Care
 - LCMS World Mission
 - Worldwide KFUEO Radio
 - LCMS Joint Seminary Fund



What are the Eternal Benefits of Transfer the Blessings?

Transfer the Blessings gives congregations a new opportunity to engage members in Biblically-based LCMS stewardship principles and the mission of the church.

Transfer the Blessings aims at creating awareness of the church's mission through promotions tailored to the congregation. The volunteer gift planner will provide an avenue for members to establish **Lifetime Plans for Giving™** and be reminded of the church's ministries.

Transfer the Blessings incorporates the resources of the LCMS Foundation through the volunteer gift planner. This relationship brings a new potential for funding ministry.







**Contact us today
to enable your
ministry for tomorrow.**

Terry Gerdts
Senior Vice President
Gift Planning Services

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