

What are the tax advantages of making a gift to the Endowment Fund? Gifts to the Endowment Fund are tax-deductible. A tax deduction is taken by you on your federal and state returns and the IRS considers the gift a completed action and irrevocable.

Please consult your tax advisor for specific information.

Where will my endowment gift be invested?

Currently, the Endowment Fund is invested in the ELCA Pooled Income Fund. The fund may be transferred to a different investment pool if deemed advisable by the Trinity Church Council and Finance Committee, who are responsible for that decision.

What are the priorities for the investment of the Endowment Fund?

The Endowment Fund is invested primarily to preserve capital; second, to produce annual returns to fund current and emerging ministries; and third for growth.

Is it possible to make a gift in “honor of” or “memory of” another person or group?

Absolutely! Not only is it possible, but it is encouraged. You, and those so honored or remembered, will be recognized publicly for your endowment gift, unless your preference is to remain anonymous.



May I designate a specific program where my gift to the Endowment Fund is to be exclusively used?

The primary purpose of the Endowment Fund is to support new and emerging ministries. However, you may choose to designate your gift to Missions, Worship and Music or Children, Youth and Family.

How often is the interest from my gift to the Endowment Fund distributed?

The ELCA Pooled Income Fund provides quarterly distributions from the Endowment Fund. Your gift keeps on giving. Earnings are distributed back to Trinity, which has an annual goal of a 5% distribution from total returns to the fund.

Does the principal value of my gift ever change?

It may. Your gift is invested in the ELCA Pooled Income Fund, which consists of bond, and equity markets which change in value daily. While the fund is conservative the value of the funds will change in response to market conditions.

How do I go about making a gift to the Endowment Fund?

The Endowment Fund is separate from the weekly contributions which support the budgetary needs of the church. The Endowment Fund is not intended to interfere with stewardship or other programs of the church.

Please contact a member of the Endowment Committee to learn more about this exciting opportunity!

Trinity Lutheran Church | (trinitylc.org)
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Seeds of the Future



“They are to do good, to be rich in good works, generous, and ready to share, thus storing up for themselves the treasure of a good foundation for the future, so that they may take hold of the life that really is life.”

1 Timothy 6:18-19

Dedicated to the Future of
Trinity Lutheran Church through Gifts to the
Endowment Fund



CREATING A FIRM FOUNDATION.

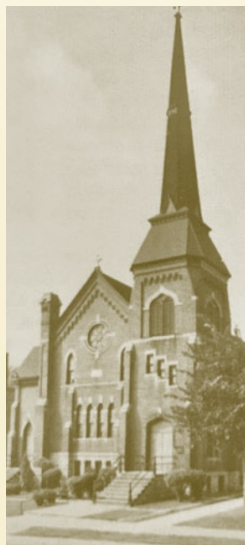
We invite you to consider joining the Trinity Lutheran Church Legacy Circle, a family of faithful members who wish to remember our Church with a legacy gift.

WHY 1871? Trinity Evangelical Church of Stillwater was organized July 18, 1871 with 34 adults and 13

children. Trinity has become known as a congregation with both a solid Lutheran identity and a progressive, ecumenical ministry presence. Through the years, Trinity has been a pioneer in developing innovative ministry programs for worship, missions and children, youth and family and adult learning. This foresight by Trinity's pastors and leaders with the faith to invest in new ideas, has kept Trinity a vital congregation. Joining the Legacy Circle allows us to recognize your gift while you are alive to celebrate with us!

MISSION. Trinity Lutheran Church's mission for the Endowment Fund is to support the development of new and emerging ministries and ongoing programs engaging people with the Gospel of Jesus Christ.

Making a planned gift helps carry the message of Christ and His Gospel, and to sustain His work through our church now and in the decades ahead by protecting against changing economic conditions, through a perpetual fund of income producing assets prudently managed.



PURPOSE. Since its inception in 1997, the main purpose of the Trinity Endowment Fund has been to support new and emerging ministry opportunities. Our endowment fund is an example of the result of sacrifices made by current and past parishioners that benefits our parish now and in the future. All funds received will be invested in common, producing annual earnings to be used by Trinity. Only the earnings may be used, with principle re-invested in perpetuity.

GIFTS. A Gift to the Trinity Endowment Fund is a gift made through the generosity of members and friends. These gifts support Trinity's ministries long into the future. It's a GIFT that keeps on giving! Trinity's commitment to supporting new and emerging ministries and ongoing programs will be secured because of these gifts.

DESIGNATION. Although all designations will be honored, we suggest a 1/3, 1/3, 1/3 gift, meaning 1/3 to the General Fund, 1/3 to Facilities and 1/3 to a Program area. However, your gift may be designated in any of the following areas:

- **General:** Support Trinity's vital ministries as determined by church leadership.
- **Facilities:** Support the upkeep of the building.
- **Missions:** Support the needs of service organizations locally and around the world.
- **Worship and Music:** Support funding for unique worship experiences, which enhance Trinity's worship programs.
- **Children, Youth and Family:** Support programs that serve Trinity's children, youth and adults.

MAKING A LEGACY GIFT.

A gift of any size is significant. The best gift is one that is appropriate for the donor. A Legacy Gift can be structured to benefit the donor during the donor's lifetime or to benefit the Endowment Fund at the death of the donor. Legacy Gifts can be given in honor or memory of a loved one. Some examples are:



- **Wills or Bequests:** The bequest through a will enables the donor to retain the asset during the donor's life and provides significant support to the Endowment Fund when the donor no longer requires the asset.
- **Insurance:** An existing or a new policy may be donated, or the Endowment Fund may be named a beneficiary.
- **Retirement Plan Assets:** In some cases, retirement plans can be the heaviest taxed assets in an estate. When bequeathed to the Endowment Fund, the gifted assets may be transferred tax-free.
- **Cash, stocks, bonds, real estate and property:** Gifting property that has appreciated may allow the donor a tax deduction for the current market value.

GIFT AMOUNT. Gifts of \$2,000 or more are eligible for the Endowment Fund. These gifts are added to Trinity's current investments in the Evangelical Lutheran Church in America's ELCA Pooled Income Fund and the investment proceeds are used to fund your designated ministries.