

# PILLAR FOUR

## Providing a Lifetime Plan for Giving

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Church members are encouraged to make a lifetime plan for giving. Planned giving is a way for people to assure their passion for giving is properly and wisely directed to take care of their loved ones and the ministries they care about.

The goal of *Transfer the Blessings* is to assist congregational members with their Lifetime Plan for Giving™ ([www.lcmsfoundation.org](http://www.lcmsfoundation.org)). 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 its 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.

*Transfer the Blessings* involves several cooperative steps between a congregation, the volunteer gift planner and The Lutheran Church—Missouri Synod Foundation.

1. Establish a congregational support structure involving the pastor, committee members and other key staff (school principal, etc.).
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 have them attend a two-day training session hosted by the district through the LCMS Foundation.
4. Select the volunteer gift planner from the team.
5. Commission the volunteer gift planner.

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

1. **Understanding stewardship:** The 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 the *Lifetime Plan for Giving*.
7. **Completing the Lifetime Plan for Giving:** Establishing lifetime plans for giving and acknowledging the gift.

The suggested resource is *Transfer the Blessings* provided by the LCMS Foundation. Learn more at [www.lcmsfoundation.org](http://www.lcmsfoundation.org).

