

Who determines the distribution of the Fund's earnings?

All gifts to the Endowment Fund are prudently invested. Only the annual earnings are available for distribution. Grant applications will be reviewed by the Board of Managers who will present recommendations to the English District Board of Directors for approval and distribution of grants.

Would my gift be tax deductible?

In most instances - yes. Although gifts to the fund generally qualify for an income tax deduction, you should seek advice from a tax professional for your particular situation.

Who manages the fund?

The District Board of Directors, which will review the actions and activities of the Endowment Board of Managers.

Whom do I contact for information?

English District office staff can answer your questions or supply you with the names and phone numbers of the members of the Board of Managers.



English District Lutheran Church—Missouri Synod

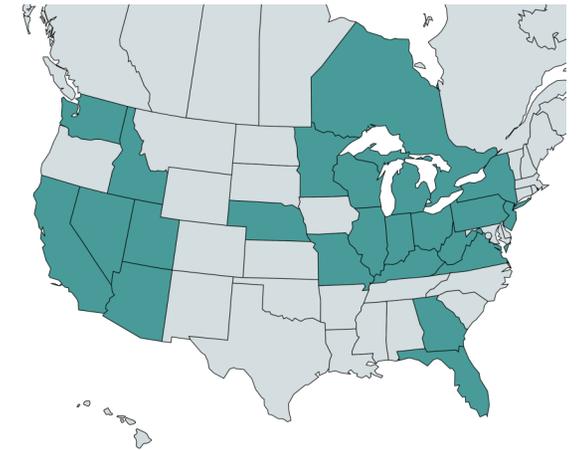
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1/2022

ENGLISH DISTRICT

Lutheran Church—Missouri Synod

ENDOWMENT FUND



Your contributions to this Endowment Fund will build a legacy for the future and provide much-needed resources to expand the work of the Lord across North America and may be a tax benefit to you.

What is the Endowment Fund?

The English District Endowment Fund provides God's People with a unique opportunity to participate in a perpetual fund. The fund is an orderly and convenient method to receive and administer gifts and bequests for the specific purpose of assisting congregations and ministries of the English District of The Lutheran Church—Missouri Synod.



This Fund will assist congregations in supporting:

- Campus Ministries
- Human Care and Disaster Relief
- New Missions
- Financial Aid Scholarships
- Church Worker Debt Reduction
- Other approved ministries

How can I make gifts to the Fund?

Cash: All cash donations are tax deductible, subject to state and federal tax laws. Contributions can be made as memorial gifts in memory of family and friends. Cash donations can be made online at the district [website](#), by text to give, or by sending a check.

Securities and Real Estate: Gifts of appreciated assets, such as real estate or securities may give you special tax benefits including reduction of capital gains tax.

When making gifts of stock please inform the Endowment Fund Board of Managers of your intentions. You will receive guidance and the Broker Direct Form to use for the transfer.

Deferred Funding Gifts:

Gift Annuity: This is similar to a unitrust, except that the partial tax-free income amount is constant and the second person's income can last for their lifetime.

Last Will and Testament: This is perhaps the most convenient and most significant method of continuing your stewardship.

Retirement Plans: The Fund can be identified as the beneficiary of an IRA, 401K, or other specified plan.

Life Insurance: A policy can be written for the life of the donor. The policy is owned by the English District LCMS and the premiums are tax deductible to the donor. If a policy is cancelled, its cash value immediately becomes available to the Fund. Also, the owner of the donated policy can designate the Fund as a full or partial beneficiary.

Charitable Remainder Trust: Cash, real estate, or securities may be given to the LCMS Foundation and receive income for one or two person's lives, plus up to 20 years for heirs. At the end of the term chosen, the English District-LCMS can receive the principal.

Life Estate Contract: The contributor deeds a personal residence, farm, or other property to the Fund while retaining the rights and full benefits of using the property until the contributor elects to transfer the property to the Fund. An immediate income tax and federal estate tax deduction may be allowed.

Congregations can contribute to the Fund as part of their budget, matching gifts of members, or as a tithe from gifts they receive. Board managers are available to discuss options with you.