

To include Bethesda Lutheran Brethren Church in a will or living trust, you can use this simple paragraph:

"I give, devise and bequeath to Bethesda Lutheran Brethren Church, a Wisconsin nonprofit church and a qualified 501(c)(3) organization, located in Eau Claire, Wisconsin, Federal Tax ID Number 39-1211789, the sum of _____ (or % of my estate), (or other personal property herein described) to be invested in the Bethesda Legacy Fund and used for its ministries as it shall determine."



Growing Ministry with the Bethesda Legacy Fund



Your gift to the Bethesda Legacy Fund will serve the continuing mission of Bethesda by:

- Furthering our efforts in international missions
- Expanding efforts in local or North American mission
- Providing seminary scholarships for future pastors and missionaries
- Major capital/building projects
- Other uses with approval of the Elder Board and Legacy Fund Stewardship Committee



Bethesda Lutheran Brethren Church
123 W. Hamilton Avenue
Eau Claire, WI 54701
(715) 835-5073

BETHESDA LEGACY FUND



MAKE AN INVESTMENT
THAT CAN SUSTAIN
MINISTRY FOR DECADES

*"Wealth gained hastily will dwindle,
but whoever gathers little by little
will increase it." —Proverbs 3:11*

The Bethesda Legacy Fund was established in 2020 to enable the growth of our church and ministries today and far into the future.

Leave Your Legacy

Choosing a Gift Plan to Fit Your Goals

There are a variety of ways to give to the Bethesda Legacy Fund. Prayerfully consider the best options for you with the information here and discuss your plans with your estate, tax, and your financial advisors.

Cash/Check Donation Options	
Cash/Check Donation	Complete the form included in this brochure, and deliver completed form with your donation to: Bethesda Lutheran Brethren Church, 123 W Hamilton Avenue, Eau Claire, WI 54701
Give Online	<ul style="list-style-type: none"> • Donate through the Bethesda mobile app and choose the fund: Legacy Fund • Donate online through Bethesda's website at https://ppay.co/n0XGcF8QTHQ. Select "Give one time" or "Set up recurring." A recurring gift allows you to give a designated amount on a repeating schedule that you choose.

Estate Planning Options					
Make the Bethesda Legacy Fund a beneficiary of various assets, such as retirement plans or life insurance policies by designating the asset as Beneficiary using the following information: <ul style="list-style-type: none"> • Legal Name: Bethesda Lutheran Brethren Church • Federal Tax ID Number: 39-1211789 • Address: 123 W Hamilton Avenue, Eau Claire, WI 54701-6916 					
Your Giving Vehicle	Your Personal Goals	Income to Donor/Heirs	Income Tax Deduction	Capital Gains and Estate Taxes	Attractive Funding Assets
Bequest in your will	Minimizing taxable estate; Provide for favorite charitable causes	No	No	Avoided	Assets that continue to generate taxable income for estate heirs
Retirement plan beneficiary designation	Provide for charity with pre-tax dollars	No	No (but avoided income tax that would accrue to heir if named beneficiary)	Avoided	IRAs other qualified plan assets
Life Insurance	Provide for favorite charitable causes	No	Yes, if the policy ownership is given to Bethesda. No, if Bethesda is named beneficiary	Avoided	Paid up whole life policies; Policies with annual dividends greater than premiums
Charitable Remainder Annuity Trusts (CRUT & CRAT)	Create income for self, others; Establish permanent charitable legacy	Yes	Yes	Estate taxes are avoided, but gift tax may be due	Income producing assets; Assets to be passed to children, such as shares in closely-held business
Charitable Lead Trust (CLT)	Transferring assets to another generation (non-grantor trust); income tax deduction (grantor trust)	No	No (non-grantor trust); Yes (grantor trust)	Estate taxes are avoided, but gift tax may be due	Income producing assets; Assets to be passed to children, such as shares in closely-held business

* Bethesda Lutheran Brethren Church does not offer legal advice to individuals regarding their estate plans. We encourage donors considering a bequest to Bethesda to work with their legal and financial advisors.



Donor(s)/Agent(s) information

Name _____

Address _____

City _____ State _____ Zip Code _____

Phone Number _____ E-mail Address _____

I/We (the "Donor") hereby donate to Bethesda Legacy Fund as trustees, an amount of

\$ _____ *

*The amount actually received at the time the application is signed by the Donor.

Donor Signature(s)

Signature of the Donor(s) or Agent(s) of the Donor: _____

Name of Donor(s) or Agent(s) _____

Dated this _____ day of _____, _____

Bethesda Legacy Fund Administration

The donation will be administered by the Legacy Fund Stewardship Committee in accordance with the Bethesda Legacy Fund governing document, Investment Policy, and Spending Policy.

Copies of these documents are available upon request.

Acknowledgement of Bethesda Legacy Fund, as trustee, of acceptance of the donation.

Dated this _____ day of _____, _____

Signature of Executive Pastor _____