

*Trinity Lutheran Church*

*Endowment  
Fund*



leave your  
**lasting  
legacy**

## *What is the Endowment Fund?*

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Trinity's Endowment Fund is a permanent fund in which the principal of each gift will be held intact. The income it generates will be used to sustain and strengthen the various areas served by Trinity. This permanence of principal provides support not just for one year, or even one generation, but in perpetuity.

## *How did the Endowment Fund begin?*

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Trinity has always been blessed with generous givers and has always had legacy gifts of some sort to steward. Prior to the Endowment Fund legacy gifts were managed individually through various sorts of investments or even kept in the form they were presented in (stock certificates, cd's, bonds, etc.) but in January of 1994 the gifts were combined and the "Trinity Endowment Fund" was created. At the end of 1994 the principal balance was \$97,000.

## *Who Administers the Endowment Fund?*

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The Endowment Fund Committee was formed when the fund was created to encourage, receive and administer gifts consistent with the principles of sound stewardship and in accord with the policies of the Congregation. The committee is responsible for making policy recommendations to the Church Council and implementing these policies in relation to management, investment decisions, disbursements, gift counseling, and communications.

The committee consists of the Lead Pastor; the Church Council President (or his/her designee); a Council appointed Trustee; and three other members elected by the congregation to two-year terms (one of whom is appointed by the committee as Co-Trustee).

# Legacy Giving

## When can I contribute to the Endowment Fund?

- When you would like to make a charitable contribution for tax related deductions.
- When you would like to create a memorial that recognizes a loved one.
- When you review your life insurance contracts, retirement funds, or make or revise your Will you can name Trinity Lutheran Church as one of you beneficiaries. The following language ensures that your gifts will be directed appropriately:

*I bequeath \_\_\_% of my estate (or \$\_\_ amount)  
to Trinity Lutheran Church,  
located at 511 South Fifth Street  
Saint Peter, MN 56082  
designated for the Trinity Lutheran Church  
Endowment Fund.*

- Anytime you are interested in sustaining and strengthening Trinity Lutheran Church's development and missions.



### Types of Gifts that can be given to the Endowment Fund.

- Cash gifts
- Stocks
- Bonds
- Real Estate
- Personal Property
- Annuities
- Life insurance
- Bequests
- Memorials
- Qualified Retirement Plans

*For more information about gift types please ask to see our Major Gift Acceptance Policy.*

If you would like to know more please contact the church office.

*How does Trinity use the income  
from the Endowment Fund.*

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Many activities of Trinity Lutheran Church are supported through our weekly or monthly offerings. But to carry out its missions, our church increasingly has needs that reach beyond the scope of the congregation's regular budget.

Our Sunday School & Youth Programs, the choir music and instruments, scholarships for college and camps, the library and adult education are almost entirely funded by the spendable income from the Endowment Fund. Some of our foreign missions, special ministries, outreach programs and capital improvements also get funding from this source.



*How is the Endowment Fund Invested?*

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The investment policy allows funds to be invested in a mixture of short, intermediate, and long term investments. The Endowment Committee is also committed to investing in socially responsible funds.

*A Man has made  
at least a start on  
discovering the  
meaning of human  
life when he plants  
shade trees under  
which he knows full  
well he will never sit.*

*~David Elton Trueblood*

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