

## MANAGING YOUR GIFTS

When you choose to give a gift to the Legacy Fund, your Legacy Fund Committee recognizes that you have asked them to be good managers of your gift. They will seek professional assistance as necessary to process gifts and to invest them wisely.

St. Paul's Legacy Committee is responsible to ensure that distributions to the fund are made in accord with the Legacy Fund charter so that the wishes of the donors are carried out.

## THE LEGACY SOCIETY

The St. Paul's Legacy Society exists to encourage others to join you in leaving a spiritual legacy. If you have included St. Paul's or some other Wisconsin Evangelical Lutheran Synod ministry in your estate plans, you are eligible to be part of the St. Paul's Legacy Society.

For more information, contact  
Pastor Panitzke  
414-422-0320 ext 122  
ppanitzke@stpaulmuskego.org

## QUESTIONS

For questions regarding giving to the Legacy Fund, contact our Business Administrator

Dan Lippert  
414-422-0320 ext 120  
dlippert@stpaulmuskego.org

For help with Christian estate planning, contact our WELS Planned Giving Office at 414-256-3209 and ask to speak to a WELS Planned Giving Counselor. They will be happy to answer questions or to meet with you personally to help you with your estate planning.



The logo features a stylized human figure with arms raised, set against a red square background. To the right of this icon, the text "St. Paul's" is written in a serif font, and "Legacy Funds" is written in a larger, bold, sans-serif font below it.

# St. Paul's Legacy Funds



St. Paul's  
S66 W14325 Janesville Road  
Muskego, WI 53150

## YOU ARE A MANAGER

As a Christian, you are a manager. You believe your abilities, your time, and your possessions belong to your Creator and Redeemer. You manage them as the Owner desires. As a manager, you use...

- Some resources to take care of your personal needs.
- Some resources to take care of your family.
- Some resources to care for the needs of others.
- Some resources to support the mission of the church.

The St. Paul's Legacy Fund exists to help you, through careful estate planning, to maximize your resources to fulfill all of these management goals both in life and at the time of your death.

*"The earth is the LORD's,  
and everything in it,  
the world, and all who live in it"  
(Psalm 24:1)*

## ST. PAUL'S LEGACY FUND

The Legacy Fund provides the organization and structure to allow members to give gifts of possessions such as...

- Cash
- Real Estate
- Stocks, bonds or mutual funds
- Retirement plans
- Life Insurance
- Collectibles
- Other types of real and personal property

Gifts and bequests to the Legacy Fund provide long-term support for the ministry of the church over-and above the current giving.

"The Legacy Fund shall be used to extend and expand outreach and ministry through the programs of St. Paul's... Distributions from the Legacy Funds cannot be used for normal operating expenditures" (St. Paul's Legacy Charter).

*"Even when I am old and gray,  
do not forsake me, O God,  
till I declare your power  
to the next generation,  
your might to all who are to come"  
(Psalm 71:18)*

## LEGACY FUND OPTIONS

Distributions are not for routine operating expenses, but for projects beyond the scope of normal budgeted programs. The Legacy Fund allows for 5% of the fund to be distributed annually to produce an on-going endowment.

### A. Undesignated Fund -

Distributions at the congregation's discretion.

### B. Outreach Fund -

For St. Paul's outreach or outreach through other WELS organizations.

### C. Christian Education Fund -

For St. Paul's School system and tuition assistance to students at St. Paul's or St. Paul's students at other WELS schools.

### D. Capital Projects Fund -

For renovations, improvements, or seed money for building expansion.

If you wish your gift to be used more quickly, consider a fifth option.

### E. Gift Trust Fund -

Like the Undesignated Fund above, distributions are available for use at the congregation's discretion. However 30% of the remaining principal may be distributed annually so that gifts are distributed over approximately 10 years.