



Your partner for increased funding through legacy giving and endowments.

Would an unexpected gift of \$200,000 make an impact on your ministry? How about a gift of over \$1 million? Would it help if you had an inexhaustible source of ministry funding that simply injected thousands or tens of thousands of dollars into your books every few months? If so, then you may want to learn more about endowments, legacy giving, and the ELCA Foundation.

Through a partnership with the Southwest Minnesota Synod, the ELCA Foundation is here for you. We provide expert services and resources to grow the funding that fuels your ministry through sources you may not have known existed.

Your Trusted Advisor

Since 1999 the ELCA Foundation has worked with congregations, synods, and specialized ministries. Over 1000 congregations and approximately 200 camps, campus ministries and others rely on us as their trusted advisor. We bring the collective wisdom of these ministries and 25+ years of experience working with endowments and planned giving – important but underused aspects of fundraising for ministry. We provide guidance on the governance, policies, and marketing strategies you will need to build these practices into your ministry.

We can also be a trusted advisor for those who support your ministry. Planned giving, also known as legacy giving, has huge potential and is common enough that nearly everyone can do it, but complicated enough that everyone could use a little help. The ELCA Foundation provides Regional Gift Planners to work directly with your donors to create gifts through their wills, trusts, or other estate plans. Their services are confidential, independent, and free.

Your Endowment's Investment Resource

An endowment fund, also known as a perpetual fund, is money you set aside and invest. That investment then goes to work providing an unending stream of funding for your ministry. Not all endowment investment options are equal. No other service explicitly manages your investment according to Lutheran faith values. The Ministry Growth Fund of the ELCA Foundation is a long-term, stable, and socially responsible endowment fund that provides distributions to fund ministry, now and well into the future. The fund was designed specifically for endowment funds of congregations, synods, camps, and other ministries of the ELCA.

Enjoy the collective strength of investing together with other ministries. With over \$1 billion in assets under management, the Ministry Growth Fund gives every investor access to the same full market clout of the whole body. You can begin with an initial investment of as little as \$25,000.

Your Educational Resource

Endowments and planned giving may be unfamiliar to you or those who support your ministry. Because of that the ELCA Foundation offers free teaching resources, educational materials, and marketing resources to build awareness and encourage your supporters to grow their giving to your ministry through endowments and planned gifts.

The Impact of Endowments in the Southwestern Minnesota Synod

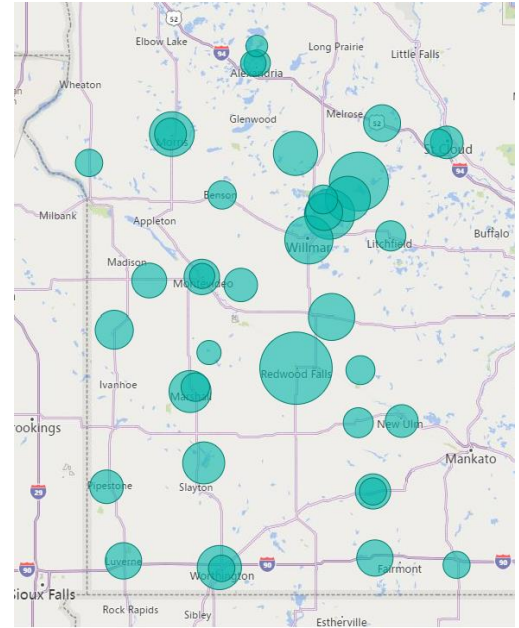
Here are a few quick facts about endowments already at work around the Synod*:

- Number of existing endowments..... 82
- Ministries with endowments 46
- Collective value\$13,760,674
- Amount disbursed annually \$525,382
- Number of Synod endowments..... 9
- Collective value (synod only)\$2,457,419
- Annual disbursements (synod only)\$93,824

Work accomplished in 2023 by ministries in the Southwestern Minnesota Synod with the help of the ELCA Foundation:

- Additions to existing endowments \$1,659,344
- Value of new endowments created\$542,300
- Accounts stewarded.....51
- New endowments created..... 6
- Ministries contacted 104
- Donors contacted.....93
- New planned gifts committed..... \$1,042,300

**Amounts as of 12-31-2024 – some figures estimated.*



Endowment map of SWMN Synod. Each dot represents a separate endowment. The larger the spot, the larger the account value.

Meet your ELCA Foundation Regional Gift Planner in Southwestern Minnesota



Rev. Keith Pearson
Regional Gift Planner
ELCA Foundation
(773) 380-2483
Keith.Pearson@ELCA.org
www.Foundation.elca.org

I am your local representative of the ELCA Foundation. Together with my team at the Foundation we offer expertise and guidance for ministries exploring their options for endowment investing and planning for the future. We offer:

- Endowment fund planning, guidance, and resources
- Education through seminars on wills, estate plans. and charitable gift planning
- Investment options for endowments, including the ELCA Ministry Growth Fund

I can also help donors create a gift plan that maximizes tax advantages and financial estate-planning goals. Options include:

- Gifts made through wills, trusts, or estate plans
- Charitable gift annuities
- Donor-advised funds
- Named endowment funds
- Gifts of cash, securities, and real estate
- Qualified charitable distributions from individual retirement accounts (IRA)
- And more