

Stewardship and End of Life Issues:
Time for Some Pie?

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Prosper. Invest. Endow.
A Recipe for Generosity

Prosper
Invest
Endow



Legacy of a Lifetime
Live Forward, Give Forward



2

The question with which you begin a meeting shapes the outcome of the meeting.



3

What is your Net Worth?




4

What is your Net Worth?

- Family and loved ones
- Faith and Values
- Passions
- Vocation
- Assets



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"What's the greatest possibility you can imagine God could do with your life story or legacy—now and beyond this life—that would bring joy and blessing to others?"

Bishop Jon Anderson, ELCA

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Happy are they who...

- Dr Mark Allan Powell
- Professor of New Testament
- Trinity Lutheran Seminary

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What's P.I.E. all about?

Designing a life – your life --that fully reflects the joy of Christian discipleship



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What's P.I.E. all about?

Fulfilling God's purpose – calling – for our lives.



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What's P.I.E. all about?

Designing a life – your life -- that fully reflects the joy of Christian discipleship

Fulfilling God's purpose – calling – for our lives.

Investing ourselves and our assets as though they are God's and we are only stewards of them . . . In this life and beyond



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What's P.I.E. all about?

- Being intentional in sharing our life stories and how they shaped our net worth
- Assuring that future generations have the opportunity to know and grow in faith



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What if, instead, the questions are

- What makes you happy?
- What is your passion?
- What do you want to be remembered for?
- What do you do, and what will you do, to shape your legacy?
- How will YOUR story be shared?
 - family stories: what events were important in shaping your life?
 - What was important in your vocation and choices?
- When was your church membership and faith most important to you?
- What do you wish you'd been able to do?

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Stories

Stories are what make history more than a collection of dates, people and places.

Family stories: answering the "why" and "how" questions for generations

Illustrate the values by which a person has lived

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Dolly Olson

Stories include:

- "Grandpa Nelson and 'Tom' (Thomas Nelson)
- "Christmas Holidays Reminded"
- "The President Steve Nixon"
- "Home & Shell Moment"
- "My Grandpa"
- "Walking to ..."
- "Full Time for my Great Grandchildren"

ET will record this




Jim Barkley—Sonant History

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[Video of Jim Barkley on family stories. Link is listed in Resources]

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Legacies

... are footprints we leave behind after we die.

They prove that we were here: we lived, we mattered, we made a difference.

Rachael Freed



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Legacy of a Lifetime

"What if you could get church members to enjoy being good stewards in ways that keep your mission going – and growing? What if they got excited about laying a foundation for vibrant new outreaches that changed lives? And what if they embraced the opportunity to fund the future through a simple gift in their wills?"

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Psalm 1

- Happy are those who do not follow the advice of the wicked, or take the path that sinners tread, or sit in the seat of scoffers;
- 2 but their delight is in the law of the LORD, and on his law they meditate day and night.
- 3 They are like trees planted by streams of water, which yield their fruit in its season, and their leaves do not wither. In all that they do, they prosper.

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Gratitude

"We are surrounded by God's benefits. The best use of these benefits is an unceasing expression of gratitude.

John Calvin

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generosity
CHOOSING A LIFE OF OVERFLOW

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Your financial assets will be distributed whether you plan or not. . .

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Only you can share your values and stories

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Everyone: You are never too young or too old to want to make a difference

Who needs to do estate planning and when?

Apart from finances:

- Care for dependents
- Powers of Attorney
- HIPAA waivers/permissions
- Medical Power of Attorney
- DNR
- Funeral and burial preferences

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Getting Our House in Order

As stewards of our resources, we:

- Accumulate
- Preserve
- Distribute



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Who Will I Leave My Estate to?

Three Places



Family & Friends

Ministry
Charity, Ministry and Mission

Government

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Goals

- Provide for family
- Guardians for dependents
- Avoid arguments
- Powers of attorney
- Mission
- Name personal representative/trustee
- Christian preamble

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STOCKS CLIMB HIGHER



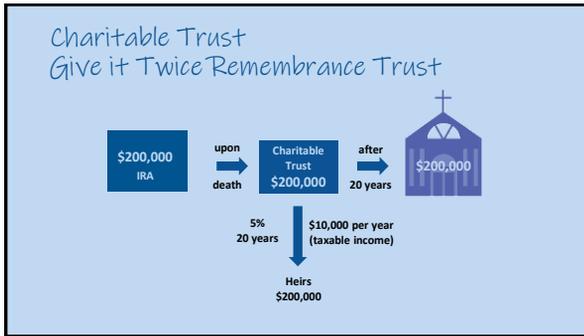
What will I leave?

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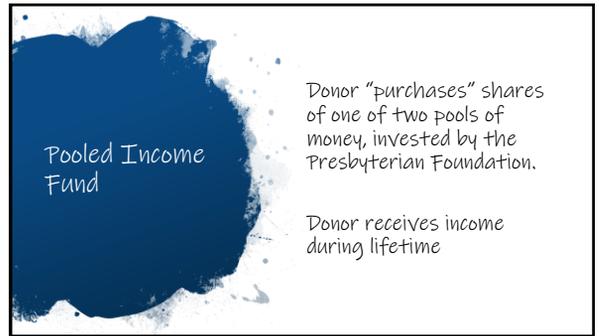
The nuts and bolts

Helping people identify ways to make legacy gifts from assets they don't normally consider, or to find ways to make gifts through instruments they are not familiar with.

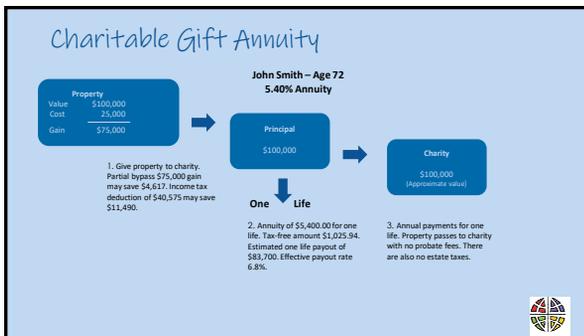
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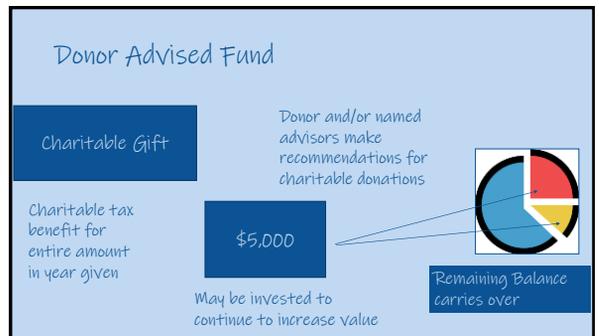
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Required Minimum Distributions

- At age 70 ½, a RMD will be sent to the owner of a pre-tax retirement savings account: 401k, 403b, IRA
- Owner can designate the RMD payments directly to a qualified charitable organization to avoid taxes.

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Resources

- ELCA
 - <https://search.elca.org/Pages/ResourceResults.aspx?k=stewardship>
 - www.elca.org/resources/ELCA-Foundation#gift
- PCUSA
 - www.presbyterianfoundation.org
 - www.stewardshipnavigator.com
- University of Minnesota: Grandma's Pie Plate
 - <https://extension.umn.edu/transferring-non-titled-property/who-gets-grandmas-yellow-pie-plate#workshop-facilitators-toolkit>
- Sonant History
 - <https://sonanthistory.com/>

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