



ELCA Foundation

**This church and its ministries mean a lot to you. And they mean a lot to the communities they serve.**

The ELCA Foundation is here to help you ensure the continuation of God's work in the world now and for years to come.

### **Gift planning services for individuals:**

We can help you navigate your options to create a gift plan that benefits the ministries that mean the most to you, while maximizing your financial and estate-planning goals. Options include:

- Gifts made through wills, trusts or estates
- Charitable gift annuities
- Charitable remainder trusts
- Donor-advised funds
- Named endowment funds
- Gifts of cash, securities and real estate
- Qualified charitable distributions from your IRA
- And more

### **Gift planning services for congregations:**

We offer expertise and guidance for congregations to define how they will be good stewards of gifts shared with them and to explore their options for endowment investing and planning for the future.

We offer:

- Gift plan guidelines
- Education through seminars on wills, estate plans and charitable gift planning
- Endowment fund planning and guidance
- Investment options for endowments, including the ELCA Endowment Fund Pooled Trust – Ministry Growth Fund

## **Contact Your Regional Gift Planner Today**

**Rev. Ana L. Lugo**



Serving members and congregations in the Florida-Bahamas and Southeastern Synods

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*Everyone has a story . . .*

*What's your story?*

**We had put off this task for 30 years . . .**

We were delighted to hear, at church one day, that we might be able to receive assistance with a task that we had put off for approximately 30 years - updating our wills and health care directives. Our lives had solidified in many ways, but we still needed to make decisions regarding who we wanted to leave something behind for, if something happened to us. Many of the decisions we made earlier were no longer relevant.

Pastor Ana Lugo provided a safe, structured atmosphere where we could laugh, reflect, and pray over our important personal decisions. She provided inciteful, and astute advice, helped us set up manageable goals, and helped us find appropriate legal resources in our community. We cannot say enough good things about our time spent with Pastor Ana in getting this important task done.

~Mary Ann and Jeff Saunders, Lamb of God Lutheran Episcopal Adventure, Ft Myers

**We didn't have a plan. Now we do and I encourage others . . .**

As an ELCA pastor, I have always encouraged others to think about and create an estate plan. However, I never took the time to create my own plan. Then I met Ana Lugo and she made it so very easy. Ana was a wealth of information and I learned new ways that both my husband and I can share our gifts posthumously. With everything set in place, I no longer worry about how all of our affairs will be handled in the future. I now encourage others to meet with Pastor Ana Lugo to create an estate plan.

~Pastor Maryanne Kehlenbach, Living Faith Church, Port St. Lucie

**A gift that keeps on giving . . .**

Consistently partnering with Pastor Ana Lugo has been a gift that keeps on giving. As an ELCA gift planner, Ana brings inspiration, education, and resources to grow thankful generosity. Whether in the pulpit, meeting with small groups, offering a presentation, working with the Endowment Team, or sitting one on one with those interested in initiating or revisiting legacy gifting plans, Ana's talents have been needed, appreciated, and well received. Grateful for her faithfulness and follow through over the past three years, I look forward to a continuing partnership (and friendship!) with a colleague for whom I have the highest respect.

~Pastor Mark Benthal, Our Savior, Vero Beach