



Since 1937

CEF

CHILD EVANGELISM
FELLOWSHIP®

Reaching children worldwide™

How can I Leave A Legacy?

The word **Legacy** is defined as what a person leaves behind when he or she dies. A **Legacy** can be a monetary gift of money that is left for an individual, charity or both.

But you can also think of leaving a legacy as the transferring of your values to the next generation. The values that become your legacy can help shape the future for generations to come.

By choosing to **Leave A Legacy** through your assets, you can provide for those you love **AND** ensure the ministries supported during your lifetime, will be able to continue doing Kingdom work in the future. With proper planning, you can make a larger charitable contribution than you thought possible while minimizing the tax burden to your estate.

Child Evangelism Fellowship® would like to help you fulfill your philanthropic objectives by providing information on how to properly design an estate plan. Gift planning that reflects your personal beliefs and values is one of the easiest ways to **Leave A Legacy**.

We recognize the complexity of the estate design process, so we have provided some Frequently Asked Questions to help initiate the conversation. A good estate plan is an integral part of total life stewardship, entrusting what God has given to our care.

If you would like to discuss further how **Child Evangelism Fellowship** may fit into your charitable gift planning, please call our office and we will be happy to assist you.

Child Evangelism Fellowship of Wisconsin, Inc.
Southeast WI Chapter
262.373.1780

Remember.....a goal without a plan is just a wish!
Is your estate plan in order?

Estate Planning – Frequently Asked Questions

Why do I need an estate plan?

At the time of death, your assets will be distributed to at least two of the following three beneficiaries: your chosen heirs, the charitable organization(s) of your choice OR the United States government. If you don't stipulate your desires in a legal method, a significant portion of your estate could be reduced by taxes rather than directed to your loved ones and charitable organizations.

What makes up my "estate"?

If you have possessions, you have an estate! Your estate consists of all assets that you possess at the time of your death. These assets include: bank accounts, cash, real estate, personal property, securities, business interest, retirement plans, IRA's and life insurance. Deciding in advance how you plan to distribute your assets at your time of death is known as estate planning. You might be surprised to learn how even a modest gift from your estate can truly benefit a ministry or organization important to you. Consulting a professional advisor (lawyer, CPA, trust officer, insurance professional, estate or financial planner) who can help you fulfill your intentions through legal methods is strongly encouraged.

If I decide to Leave A Legacy, what is the first step?

Carefully consider each organization whose mission best reflects your personal beliefs and values. Reflect on how your community or individuals would be affected if those organizations did not exist. Inquire how your charitable gift could provide financial security to further their mission for years to come. Speak with representatives of the ministry/organization to share your intent and to ensure that your estate gifts are appropriately directed.

What's the best way to make a gift to a charitable organization?

There are many ways to Leave A Legacy. You can give a fixed sum of money, specify certain property, establish a Charitable Gift Annuity during your lifetime, or give a percentage of your estate at time of death. You can make a gift to a charity in your will or name a charity as the beneficiary on new or existing life insurance policies, retirement plans, CD's and/or annuities. When designating a charitable gift to CEF please list the following legal description in your documentation: **CEF of WI, Inc. of Southeast WI Chapter**.

What is God's plan of stewardship for my estate?

As Christians we need to recognize that God is the owner of all (including our estates) which places us in a position of responsibility to be good stewards of what He has given. As stewards, it is important that we use our estate assets to their fullest potential during our lifetimes – for our personal, family, business and charitable interests. At death, we must arrange for the transfer of our assets to individuals or charitable interests who will continue to use them to reflect our Christian values and lifestyles. By creating an estate plan we can make sure the transfers are made in the most efficient and effective manner.

How can I design an effective estate plan?

An effective estate plan that comes along side your values and beliefs can be achieved by:

- Setting goals and priorities in your estate plan
- Becoming familiar with the estate planning tools available
- Gathering all necessary and pertinent data to be used in the estate design
- Seeking competent counsel for technical assistance and drafting of legal instruments

Your estate is a sacred trust, which has been accumulated as a result of your labors and God's blessings. Part of total life stewardship is spending the time necessary to do a thorough job planning for the future of your estate to impact generations to come and making an eternal difference!