



Estate Planning Assistance

The Lutheran Home Association Office of Mission Advancement provides estate planning services to The Lutheran Home residents, program participants and their families.

Areas where we can help:

- Providing assistance for wills, living trusts, supplemental and/or special needs trusts, financial power of attorney and health care directives.
- Coordinating your estate plan so your wishes are carried out.
- Establishing a charitable gift annuity or charitable trust. (Life income gifts that benefit you, your family and your charities.)
- Coordinating IRA rollover, stock transfer and commodity gifts.
- Working with your attorney or helping you find one.

The Office of Mission Advancement goal is to help you accomplish what you want to do to remember your family, your church and the ministries you love, and support the TLHA ministry.

All ministry programs carried out through the work of The Lutheran Home Association rely on charitable support from people like you. While much of our health care programming is covered by government-funded benefits, these funding sources provide minimal reimbursement and are in a constant state of flux. A large portion of our budget, including our spiritual care component, must be met through donations.

Recognizing God has given each of us different financial gifts, we provide a wide variety of strategies for you to partner with us in carrying out our mission.

Office of Mission Advancement

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Current Gifts

- **Cash Gift**
- **Memorial or Honor Gift**
- **Appreciated Stock or Securities**
- **IRA Charitable Roll-Over/Qualified Charitable Distribution**

Deferred Gifts

- **Bequest**
- **Beneficiary Designation/Payable on Death (P.O.D.)/
Transfer on Death (T.O.D.)**
- **Charitable Gift Annuity/Charitable
Remainder Trust**
- **Home Endowment Fund**
- **Named Advised Funds**