Luthercare
Together in Community
600 East Main Street
Lititz, PA 17543-2224

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Together in Community

Connecting mission through generosity

Spring 2016

# Important Conversations – Why are they Important After All?

For many of us, the idea of having a conversation with our loved ones about our estate plan invokes a feeling of dread and uncertainty, but it doesn't need to be that way. In fact, the benefits of having conversations regarding your financial legacy far outweigh the cons.

## Plan to Join Us!

### Your Financial Legacy: Important Conversations

*An Informative Seminar for You AND Your Loved Ones*

8:30 am

**Friday • June 10, 2016**

**Luther Acres Community Room**
250 St. Luke Drive • Lititz, PA

Please RSVP by June 6, 2016

Christine Fauser
Donor Relations Assistant

(717) 626-1171 ext. 1624 • cfauser@luthercare.org

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Presented By:
*Office for Philanthropy*

Families that speak freely about estate planning proactively address details such as who you choose to be your power of attorney or the executor for your estate, the location of your financial files and planning documents and even your wishes regarding charitable giving. Doing so often prevents confusion and anxiety for the people you care about, and gives you peace of mind knowing that your plans and wishes have been communicated clearly.

The upcoming seminar "*Your Financial Legacy: Important Conversations*" will give you the tools you need to communicate the details of your estate plan. Mark your calendars for June 10, 2016 and join our knowledgeable panel of professionals who are prepared to provide you with insights and suggestions to make an estate plan conversation with your loved ones both comfortable and informative.

## MEET THE PANEL:

*Ann L. Martin: Attorney, Gibble Kraybill & Hess LLC.*

*Rev. Liz Polanzke: Regional Gift Planner, ELCA Foundation.*

*Theresa Baker: Community Life Manager, Luthercare.*

*Rev. Glenn A. Beard, Jr.: Director of Church Relations & Pastoral Care, Luthercare.*

# Gifts from the Heart

## LEAVING A LEGACY

Ruth Killian was a retired school teacher for the Cornwall-Lebanon School District. She was an organist. She was well traveled and touched many lives. But the thing that most people remember about Ruth was her smile, the genuineness with which she approached life and her optimistic nature. As Matt Oathout, Executive Director at Luther Acres, said recently, “She was a real cheerleader for us.” Indeed she was, and always offering a helpful perspective. Ruth was the kind of person you liked to have around.

Ruth lived for twelve years at Luther Acres, volunteering, playing the organ, helping others, and leaving her mark. It is no surprise that Ruth chose to remember Luther Acres in her will. In fact she left the remainder to Luther Acres. Her legacy is a reminder that each person can make a difference in the lives of others.

## Interested in Learning More?

Luthercare’s Office for Philanthropy is a valuable resource as you explore ways to structure your financial legacy. Our Philanthropy team is available to work with you to identify gift planning options that fit your situation and meet your needs. To schedule an informational visit, please contact us:

*Office for Philanthropy:*

**717.626.1171 ext. 1624**

## Plan ahead with this checklist...

### ESTATE PLANNING *Made Easy*

In a nutshell, estate planning is really what you want done with what you own. The good news is that you can provide for the people and causes important to you by taking simple steps now. Creating your plan for the future can be easy and even enjoyable.

While an attorney should always draft your will, we can help demystify the process and prepare you for meeting your attorney with these simple steps:

1. **Itemize Your Assets**
   Take a piece of paper and draw a line down the middle. On the left side, write something you own. On the right side, write the name or names of the person(s) you wish to receive that item or asset.
2. **Organize Your Estate**
   Make the process of organizing your estate and plans even easier by downloading our free wills guide. This fill-in-the-blank guide walks you through the process of gathering information about what you own, your family, and your goals.
3. **Write Down Questions**
   Consider practical questions, such as, “If I give my house to my adult son and my adult daughter, what will they do with it?” If you come up with a question that you can’t seem to find a solution for, make a note to ask your attorney.
4. **Review Your Plans for Family**
   You can give some assets to family right away and others over time. Ask us how you can provide an income stream or a lump sum to a loved one and achieve your personal and inheritance goals.
5. **Consider Charity**
   Remember to include any charities that are important to you in your plan. If you have given during life, then consider providing for these organizations through your estate. Ask us about plans like charitable remainder trusts and gift annuities that can help your family and our mission. Visit Your Attorney
6. **Bring the information you have gathered**
   and questions to your attorney. Your attorney can draft a will or trust that will achieve your goals. You complete the plan through a simple signing process.
7. **Update Your Plan**
   Update your estate plan as your life changes. Marriages, births, and deaths are all events that may make you want you to revise your plans.



*Our Mission:*

**Luthercare reflects Christ’s love through service to others.**