

Workshop Options

Our informative workshops provide helpful information for people of all ages as they work through the lifelong journey of financial and legacy planning.

Workshops include:

"What is Your Legacy: Protecting your Future"

"A Lifelong Journey: Faith, Family and Finances"

"Let's Talk": Women and Finance

"Creative Giving" Supporting a Capital Campaign with gifts other than cash

Other mini-workshops are available on a variety of topics.

We will also meet with your board about any asset management needs your ministry may have, such as setting up an endowment fund, or managing other ministry funds.

Visit our website at www.CovenantTrust.com to contact your local Financial Services Representative.

"I am very pleased with the wonderful and caring service Covenant Trust Company has provided to our church. They provide an invaluable service in helping Covenanters accomplish their giving wishes... I highly recommend churches use the resources of Covenant Trust Company to empower their members' giving goals. I also bear witness that Covenant Trust Company has been a source of personal help to my wife and me in making decisions for our wills and trust agreements. It is a joy to know my family is cared for in this way; but also that I can minister through my personal gifts to the Covenant ministries of my choice."

Rev. Paul Bengtson



GROW YOUR FUTURE

THE KEY TO MORE BEQUEST DOLLARS FOR YOUR MINISTRY



 **COVENANT TRUST COMPANY®**
your financial services partner

trustee services • asset management • retirement planning • legacy planning

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As a leader in your ministry, you want to do all you can to ensure its future. You want to help it grow, touch more people, and be more effective in its work. We want to partner with you to make that happen. Bequests and other legacy gifts bring unexpected blessings and opportunities to ministry. But these gifts don't just happen. Like any other worthy endeavor, they take a little work. The good news is that Covenant Trust Company is here to work with you:

- We'll work with you and any other members of your staff who need help with personal financial or legacy planning
- We'll provide the same personal assistance to any member or friend of your ministry who wants to include the Lord's work in their legacy planning
- We'll present an informative workshop about how to be a better steward of what God has given each of us through financial and legacy planning
- We'll help people get it done now, *and be there to work with them in the future.*

That's what we'll do—what do you have to do? It boils down to two simple things:

- Get your ministry's message out to your members and friends—tell them your needs and that legacy gifts are another way to help your ministry.
- Invite your local Financial Services Representative to meet with you and/or your board, and present a workshop for your ministry.

WORKSHOP FAQs

What does it cost our ministry to sponsor a workshop?

Nothing. We work with you to find a mutually agreeable date and time. There is no advance charge for materials, although we request a \$10 donation if attendees wish to take the workshop book home. We provide a complimentary workshop book for your ministry library. There is no fee for the Financial Services Representative to present the workshop.

If we host a workshop, will people be asked to make bequests to ministries other than ours?

No, the choice is always up to the individual. *If you have conveyed the mission and need of your ministry, your members and friends will want to help.* Some of them will also have interests beyond your ministry which they may wish to include in their legacy plan. We impose no restrictions or requirements on which Covenant ministries should be included in an individual's personal legacy plan.



What benefit does our ministry get?

More bequest dollars. Bequests received today were planned some time ago. Plans people make now will benefit your ministry in the future. Also, folks will often include a ministry in their legacy plan and not tell anyone, so that it comes as a total surprise when a distribution from their estate is finally received.



LET'S LOOK AT THE NUMBERS USING CHURCHES AS AN EXAMPLE. WE KNOW OF \$40 MILLION THAT IS DESIGNATED FOR COVENANT CHURCHES. MORE THAN 78%—\$31 MILLION—IS EARMARKED FOR CHURCHES WHICH HAVE HOSTED ONE OR MORE WORKSHOPS. CAMPS AND CONFERENCES BENEFIT FROM WORKSHOPS IN THE SAME WAY.

