MortarStone

LEGACY IMPACT MINISTRY WORKSHOP DESCRIPTIONS

GROUP EDUCATION EVENTS

PERSONAL GENEROSITY AND LEGACY DESIGN WORKSHOP (Estate Design)

The Personal Generosity and Legacy Design Workshop is a biblically-based approach to leaving a legacy and designing a generosity plan. Givers will learn how to pass on their values and all that has been entrusted to them. This workshop is intended for givers of all ages who have a giving history to the church and either have planning documents (e.g., a trust) or need assistance creating these documents.

Optimal Class Length: 1 Day for 1-2 hours

TAX-SMART GIVING

Life Events are best described as any situation which requires a reallocation of financial resources. Many life events involve selling or transferring a low-cost basis asset, thus incurring a taxable event. Tax-Smart Giving uses life events as a 'trigger' to make a significant, planned, non-cash gift to the church. This workshop will show those with a generosity plan how to make a current, non-cash gift as they experience various life events. Givers of any age can benefit from attending this workshop. Givers will learn about taxable events that could help their families and fund the Kingdom.

Optimal Class Length: 1 Day for 1-2 hours

WILLS & TRUST WORKSHOP

A will or trust is an essential tool that allows the giver to provide for their heirs and your church in an estate plan. The Wills & Trusts Workshop is designed to encourage your givers to create a plan for how they would like their assets distributed once they've passed away. During this workshop your givers will walk through the personal planning guide, estate finances, and planning procedures. This workshop is designed for those who currently have a will or trust which needs updating or those just beginning the process. Givers of any age can benefit from attending this workshop.

Optimal Class Length: 1 Day for 1-2 hours

RAISING LITERATE HEIRS

Over the next 30 years, America will experience the greatest wealth transfer in the history of the world. That number is estimated in the tens of trillions of dollars! Did you know that 80% of the wealth in America has been created by the wealth holders? Which presents an interesting dilemma for parents. Having not had the opportunity to have parental models themselves, they are now faced with the challenge of making sure their heirs are adequately prepared for what they will receive. This workshop will help you become more effective in transferring your values and valuables to the rising generation.

Optimal Class Length: 1 Day for 1-2 hours

CHARITABLE GIFT TOOLBOX

As givers approach and enter their retirement years, they face two needs that can be addressed through complex charitable gift vehicles. First, there is the need for passive income to sustain their standard of living, and second, the need to solve tax challenges that are presented by appreciated assets and under-performing assets. The Charitable Gift Toolbox is comprised of a variety of tools that will help your givers with both of these challenges in ways that provide gifts to the church that help now, gifts that help later, and gifts that produce income.

Optimal Class Length: 1 Day for 1-2 hours

ONE-ON-ONE EDUCATION

GIVER-CENTRIC DISCIPLESHIP

You will need to meet one-on-one with your financial leaders and build deeper relationships that are centered on generosity, discipleship, and growth. During these meetings, you can get to know your givers and learn about their passions and the causes God has laid on their hearts. Explain how their passions align with the church and the ministries they can impact with their generosity.

This is also the time to discuss gift options to help them accomplish their financial goals and charitable visions.