MortarStone

NON-CASH GIFT PLANNING 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 planning documents (e.g., a trust) or need assistance creating these documents.

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.

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.