

PLANNED GIVING Spotlight

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Estate Planning

Make Sure Your Charitable Gifts Make a Difference

You have worked hard your entire life to make a living, provide for your family, and save for the future. God has blessed you and enabled you to raise your children, live comfortably, and give generously to God's work and His people in need. You want to make sure that after you are gone, the estate you leave is handled properly. That is why you have invested time and money to set up your estate plan in a way that matches your values and communicates to your family and your world what is important to you.

Most people leave a significant portion of their estates to their children or other family members, but many also want to leave a portion to their favorite charities. Often times though, they haven't considered what they want their charitable bequest to accomplish at a specific charity. You want to make sure that your charitable gift does exactly what you want it to. This means that it will make a difference in the project and/or program that you care about. It also means that your gift will make an impact on the charity that is important to you.

Do you know what organizations that will receive a bequest from you will do with it?

(cont'd. on pg. 2)

Announcing New Minneapolis Estate Planner



We welcome Don Long, J.D., to our staff as an estate planner in Minneapolis, MN. He will be working with individuals in Minnesota, Iowa, Wisconsin, South Dakota, and Colorado.

As a dedicated Christian, Don comments, "I look at my position with Barnabas Foundation as a ministry. It's definitely a result of the Lord's leading—an opportunity to use my legal skills, talents and education in working with other Christians to help build the kingdom."

Don has been a practicing attorney for the past 27 years. In a solo practice since 1991, Don described himself as a "planner, a protector and a preserver." He helped people make the decisions, design their plans and enjoy the security of knowing that their families and businesses were protected by well-grounded estate plans. He has concentrated his practice on estate planning for the past six years.

He is married to Dotti and they have a grown son and daughter. Don has served with a number of Christian ministries, including Prison Fellowship and Christian Legal Society.

Make Sure Your Charitable Gifts Make a Difference *(cont'd. from pg. 1)*

For some organizations, your bequest will be handled in accordance with a well-established policy that determines how bequests are used to further its mission. Some bequests automatically go into an endowment fund unless the donor has given specific instructions otherwise. Some organizations put bequests they receive directly into the general operating fund. Organizations that have received very few bequests may not have considered what they would do with a large bequest. For these charities, a large bequest could result in significant conflict within the organization or other complications.

Of course, you want the organizations you name to receive maximum benefit from the gifts you give. To ensure this happens, you may need to review your plan and give some added direction to the charities you've

selected. For instance, if you leave a bequest to your church and don't want it to be put into the general operating fund, it is important that you give specific directions as to where it should be used. Maybe you want to leave a gift to your favorite Christian school or college and have it placed in the endowment fund or foundation, which would result in ongoing annual support. You may want your gift to fund a scholarship or special project.

It is important to discuss your wishes and the options available to you with a representative from your selected charity. For example, many colleges have a minimum amount for setting up an endowed scholarship. If you wish to set up a scholarship fund, make sure your gift will meet their required minimums. You also need to work with the school to establish the criteria for the scholarship.

If you would like more information on how to structure your charitable gifts or would like to discuss your plan further, call Barnabas Foundation for a confidential meeting.

Questions for Your Charitable Estate Plan Review

1. Is your list of charities still consistent with your current charitable interests?
2. Do you know how each charity will use your bequest?
3. Is there a particular project or area you would like to fund with your bequest?
4. Do you want your gift to become part of the organization's endowment fund or foundation?
5. Have you talked with someone from the organization to make sure your wishes are consistent with their policies and goals?
6. Is your charitable gift funded with the right assets to avoid any unnecessary taxes?

New Planned Giving Brochure

"...*there your heart will be also*" is the title of a planned giving brochure especially designed with your needs in mind. Written from a Christian perspective, it provides ideas about how you can support the charities that are important to you.

The brochure includes tips on estate planning and considerations that should be a priority in your planning process. It also includes information about tax and other benefits of using specific instruments for charitable giving.

To request your copy of this helpful, easy-to-read brochure, call Barnabas Foundation at 888-448-3040 or visit our website at www.barnabasfoundation.com then click on the "Contact Us" box and make your request in the message section.

2002 Giving Growth From Donor-Advised Fund

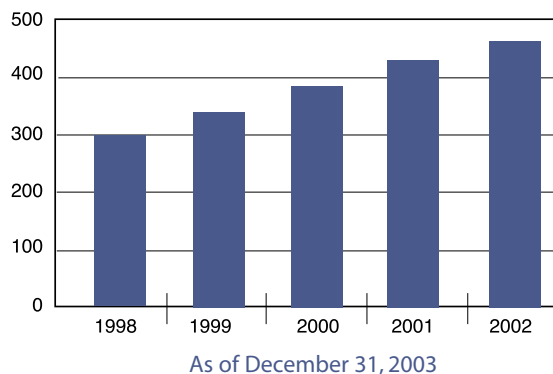
The Barnabas Foundation Stewards Fund continues to be a strong contributor to important Christian ministries, in spite of a difficult economy. Despite negative returns for the U.S. equity market resulting in a reduction in contributions into the Fund, distribution grants to charitable organizations increased from \$13.3 million in 2001 to \$14.9 million in 2002.

The Stewards Fund also experienced growth with the addition of 41 new donor accounts for a total of 461 in 2002. The fund ended December 31, 2002 with a value of \$72.2 million.

Barnabas Foundation works with Stewards Fund donors to assist them in making the most tax-efficient gift possible. The Stewards Fund also allows the donor to make a gift at the “right” time. Since donors can

recommend distributions to charities over multiple years, the donor has the ability to donate several years of charitable giving in one stock transaction. The flexibility of the Stewards Fund makes it particularly beneficial to donors and their recommended charities.

**Stewards Fund
Number Of Donor Accounts**



Update

Benefits of Real Estate Gifts

Home values have risen dramatically during the past decade. In fact, homes now represent a great “hidden” asset for many Americans. Is there a way to live in your home and receive a charitable tax deduction? Answers to this and other questions will be presented during a video teleconference, May 1 in both the Chicago and Grand Rapids market areas. If you live in one of areas and support a Christian charity there, please contact them about your interest in being a part of this event.

You may also contact Barnabas Foundation directly at 888-448-3040 to get details about the time and place of this video teleconference in both locations. If you are not located near a teleconference site, we will be happy to share a video of this “Great Gifts of Home” educational presentation. Just give us a call.

Doing What He Loves!

Dave Vander Ploeg, our former Executive Director, retired from Barnabas Foundation in December of 2000. Following two years of Dave’s retirement, we invited him to consider coming back to Barnabas Foundation part-time to do what he enjoys the most, meeting with clients about estate planning. As a result, Dave has joined the planned giving services staff on a part-time basis, meeting with clients in Michigan, Indiana and Illinois. His expertise and experience are once again making an impact for the kingdom. Welcome back Dave!

Thank You for Your Email Addresses!

In our November letter with our new office location information for your records, we requested your email address. Many of you went to our home page at www.barnabasfoundation.com, clicked on “UPDATE: Your Email Address” and submitted it to us. This is our chance to express our appreciation with a great big THANK YOU! (If you’ve not yet done it, we look forward to hearing from you via email.)



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Stewardship

Discover the Treasure of God's Gifts!

Good Steward Ministry is exclusively designed for churches and offered by the FirstFruits[®] stewardship education program of Barnabas Foundation. Good Steward Ministry is the result of years of working with churches to create a new understanding of stewardship within the hearts of congregational members. Using specially-designed services and resources, church members continue to grow in a new appreciation of stewardship as a spiritual lifestyle.

The impact of Good Steward Ministry is evidenced by Dave Nienhuis, stewardship chairperson for Haven Christian Reformed Church in Zeeland, MI. "For my wife and me, recognizing that 'God owns it all' affects everything in our lives: we now look at the difference between wants and needs. As we consider major purchases, we pray about them. We even decided against one major purchase and, consequently, have discovered exciting ministry areas to support with that money."

Dave also adds, "We always considered the tithe of 10% as something to strive for, however, we now look at 10% as a place to start!"

If you or your church would like to learn more about the Good Steward Ministry program, please request a brochure by calling Laura De Vries at 888-448-3040.

Share Your Stewardship Story!

In your own personal stewardship journey, what has been the most life-changing experience for you or your family? Maybe it was a book, a sermon, a small-group study, an event, a person, or maybe it was something entirely different! Whatever it was, we'd like you to share it.

If you use a computer, please go to our website at www.barnabasfoundation.com/firstfruits, click on "Share Your Stewardship Story" and give us the details.

Or send your story to Laura De Vries, Barnabas Foundation, 18601 North Creek Drive, Tinley Park, IL 60477-6399.