

# STEWARDSHIP SPOTLIGHT

A Publication of Barnabas® Foundation

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## FROM THE DIRECTOR



One of the joys of our work is helping families overcome challenging decisions regarding their estate plans. Spouses often come to us with widely diverging views

and how to best take care of their families.

It's a great privilege to help our clients find the right planning solutions to help them move forward. Families walk away with plans that honor God, provide for their loved ones and support the churches and organizations close to their hearts.

We love hearing about the peace and satisfaction our clients experience when their plans are complete and the documents are signed. It's like a great weight has been lifted off their shoulders.

Thank you for allowing us to be part of your life! If it's time for an update, or you need to complete your estate plan, please give us a call.

Grateful to serve you,



James Bakke, J.D.  
Executive Director

## WHEN YOU'RE NOT ON THE SAME PAGE

### 4 Steps to Help Husbands and Wives Move Past Their Planning Differences

One of the amazing things about marriage is how God pairs very different people with different ideas together. This is both a strength and a challenge!

This is especially true in estate planning. One person may have a strong opinion on how their wealth should be transferred, whereas the other person has significant anxiety. Likewise, couples may have diverging viewpoints on what and how much should be given to their children.

If estate planning is a challenging conversation in your home, it's no surprise. You're in good company!

[Here are four steps to help you move past your differences and toward the completion of an effective plan.](#)

- 1. Call it out.** This is a difficult topic and likely very emotional. Acknowledge this from the get-go, and commit to honoring and listening to one another throughout the process.
- 2. Establish shared values.** You have faith and values that have become the bedrock of your marriage and parenthood. Take a step back from the expected distribution plan and assess what you really want to accomplish and model to your loved ones.

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## CELEBRATING RECORD-BREAKING DISTRIBUTIONS

Barnabas Foundation celebrates the third consecutive record-breaking year of dollars distributed to charity. On behalf of the generous families we serve, Barnabas Foundation sent out 8,760 grants (vs. 7,548 in 2017) totaling more than \$67 million (vs. \$52 million in 2017) in charitable distributions.

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## RECORD-BREAKING DISTRIBUTIONS

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Among the top 20 recipients are organizations that serve in the areas of Christian education, humanitarian aid, global missions, elder care, Bible distribution, support for families with special abilities and more.

Generous individuals and families give through Barnabas Foundation in the form of cash, stock, mutual funds, bonds, real estate and other assets, largely through the Stewards Fund (donor-advised fund) or as estate gifts. Barnabas Foundation then distributes these gifts as recommended by supporters to a variety of churches and charities.

Since our founding in 1976, Barnabas Foundation has helped thousands of families distribute more than \$690 million to the churches and ministries close to their hearts.



*The impact of gifts made through Barnabas Foundation ripples to families, churches and neighborhoods all around the world.*

## WHEN YOU'RE NOT ON THE SAME PAGE

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**3. Identify the areas of difference or concern.** Where do you see things differently? More importantly, why? Listen carefully and seek to understand.

**4. Explore creative solutions.** Look for the planning solutions that support your shared values and help you achieve your goals.

These conversations are often best had with a planning professional experienced in guiding couples through these difficult topics – someone who understands the planning tools available, but also shares their values and approaches planning from a Kingdom perspective. This is how Barnabas Foundation planners can assist you.

**If you and your spouse would like to have a confidential conversation with someone who understands tax-wise charitable planning from a distinctly Christian worldview, email [info@BarnabasFoundation.com](mailto:info@BarnabasFoundation.com) or call 888.448.3040.**

## ASK BARNABAS FOUNDATION

**Q: What are my options for an executor of my will or a trustee of my trust?**

**A.** You have a variety of options when it comes to making this important decision.

- Family member
- Trusted friend
- Attorney
- Trust company or trust department at a bank
- In some states, a professional fiduciary

Each of these have advantages and disadvantages, but in any case, you should make sure your selected executor or trustee has the required expertise, integrity and time available. Additionally, the individual should not be named as a beneficiary or conflicted with other family relationships that would make the job more difficult. Using a non-family member can relieve a family of a lot of unnecessary stress and relational conflict.



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