



INFAITH INSIGHTS

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Kelly Jones: Changing the Conversation to Make Meaningful Plans

As a new financial associate, Kelly Jones didn't have a lot of what she calls "life experience." She was "educated but not emotionally prepared" for certain life events her clients faced.

That all changed a few years ago when Kelly's father died suddenly at age 57. She found herself asking, "Is this how my clients feel?" With that, Kelly became more intentional about the topics she introduces.

"They aren't new clients, but we're having a new conversation," she says.

Asking Deeper Questions

Losing her dad helped Kelly overcome the fear of asking clients the tough and uncomfortable questions. "If they leave unprepared, it's not going to be because I was afraid to have the conversation with them," she says.

Kelly asks clients to consider what purpose their money serves. She asks them to think about their "why." She also asks, "If you left the world today, what would you envision for this money?"

Her clients are grateful for these questions. "They want to do more with their money than leave it to family, but most people just don't know how," she explains. "That was ultimately how InFaith Community Foundation became a primary source of what I talk to clients about."

Legacy Planning with Life Insurance and IRAs

Kelly started a legacy conversation with one long-time client after his wife passed away from cancer. She could have simply continued to manage his assets, but Kelly knew the client's purpose had changed. Kelly wanted to discuss a way to honor his wife long into the future.

Through InFaith, he created a non-advised fund using qualified charitable distributions (QCDs) from his IRA to pay premiums on a whole life contract ([more information on gifts of QCDs](#)) gifted to InFaith. He also established a [donor advised fund](#) at InFaith with another universal life contract. Several charities meaningful to his wife will benefit from both charitable funds for years to come.

It's not just potential tax advantages and legacy that inspires Kelly's clients. Those with children also like that they can teach generosity in a new way by naming their kids as successor advisors to their funds when they are no longer here. "Their hope is that the younger generation will realize just how important being generous was to their parents and teach those habits to their children," Kelly observes.

Partnering with InFaith for Giving Expertise

Kelly partnered with experienced [InFaith VIPs \(Voices in Philanthropy\)](#) on joint field work to learn how they collaborate with InFaith. She discovered that asking more questions of InFaith gift planners results in more tailored solutions for her clients.

If your clients are ready for a deeper conversation about what they can do with their assets, contact InFaith gift planners at 800-365-4172.

RESOURCES

[Review 2018 Year-End Giving Deadlines](#)

[Contact a Gift Planner](#)

[ACGA Rates](#) (effective July 1, 2018)

[InFaith & Thrivent co-branded advertisements](#)

[inFaithFound.org](#)

[Financial Professional Resources Webpage](#)

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[InFaith on WeThrive](#) (for Thrivent financial professionals)

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