



INFAITH INSIGHTS

June 2018

2017 Annual Report

You and all of our donors recently received our [2017 annual report](#) titled, “More.”

It’s no secret that most InFaith Community Foundation donors come to us through financial professionals as part of an integrated financial discussion. InFaith’s mission is intentionally aligned with Thrivent’s promise to help Christians be wise with money and live generously. We appreciate the collaborative relationship we’ve built with each financial professional over the years and look forward to what’s to come.

Using Life Insurance to Serve Boomers in New Ways

It’s been a while since ‘aging baby boomers’ and ‘wealth transfer’ became catchphrases. And it will be another decade before that entire generation reaches full retirement. We surveyed baby boomers to better understand their motivations and to help trusted partners like you address their charitable planning needs.

While generous with churches and charities, boomers are not fully aware of the opportunity to increase their charitable impact using tailored solutions you recommend from InFaith. Veteran wealth advisor Don Knoernschild believes now is the time to talk with baby boomers about their charitable intentions. “This group is inheriting a significant amount of money and need a plan before they spend it,” he says.

Life Insurance Adapts to Changing Needs

Don has discovered a new way to introduce life insurance to his charitable clients to help overcome a common objection. Clients can retain control of naming benefitting charities when InFaith is the contract owner rather than an individual charity.

Once your client decides to use [life insurance](#) for charitable giving, the gift process is simple.

1. Select appropriate life product (whole life, UL, VUL, second to die, single premium).
2. After underwriting, insured makes first premium payment so contract is in force.
3. Insured absolutely assigns InFaith as contract owner and completes InFaith’s Fund Workbook.
4. Through a donor advised fund created with a gift of life insurance, the donor chooses charitable beneficiaries and the donor can change these beneficiaries at any time.
5. Insured/donor may take tax deduction on additional premium payments, if any.
6. Upon death, proceeds go into the donor advised fund and are distributed according to the donor’s wishes.

Don and another financial professional recently collaborated with InFaith on a second-to-die case. He shares three themes that surface when he talks with charitable clients. Hint: charitable planning isn’t only for the wealthy. [Read more.](#)

Let Us Help You

InFaith gift planners can consult with you on specific cases and prepare detailed gift illustrations for clients. Call 800-365-4172 to get started.

RESOURCES

[Contact a Gift Planner](#)

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

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

[inFaithFound.org](#)

[Financial Professional Resources Webpage](#)

Follow InFaith Community Foundation on [Facebook](#) and [Twitter](#) and [LinkedIn](#).

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

[Request InFaith Materials](#)

[Thrivent & InFaith Financial Professional Handbook](#)

Consider exploring [your personal giving as a financial professional](#). You’ll be able to provide a personal endorsement to your clients while supporting charities and causes that mean the most to you.

Thank you for sharing our monthly e-newsletter with colleagues. They can [subscribe here.](#)

(Continued, next page)

InFaith Community Foundation is a national charity with a mission to serve donors, spread joy and change lives. Through InFaith, gifts are tailored to each donor's charitable interests and financial circumstances. InFaith Community Foundation is a proven steward of these gifts, earning consistently high ratings from Charitable Navigator for sound fiscal management and GuideStar for transparency and commitment to excellence. Together with donors, InFaith grants millions of dollars annually to charities serving local, national and global communities.

inFaithFound.org | p 800-365-4172 | 625 Fourth Avenue South, Suite 1500, Minneapolis, Minnesota 55415

© InFaith Community Foundation

If you would prefer to unsubscribe from *InFaith Insights* emails, you can do so [here](#).
For financial professional only, not to be shown or distributed to the public.

