



# INFAITH INSIGHTS

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## Using Life Insurance to Create a Legacy

As you well know, life insurance is one of most versatile planning tools. It meets the needs of young or retired clients, individuals and families. It can minimize taxes and provide significant future financial benefit.

This same life insurance concept can be used to build a charitable legacy. Clients can make a gift of life insurance, support charities and causes important to them, and take a charitable tax deduction for ongoing premiums when the contract is owned by InFaith Community Foundation. Based on your clients' objectives, we assist by determining the best InFaith solution using your life insurance product recommendations.

## FRs Leading with Generosity

Thrivent Financial representatives Matt Buehrer and Andrew Mortenson have helped many clients realize their charitable goals with life insurance. Incorporating a personal desire to 'lead with generosity' has fostered success for both of them.

"It's easy for me to talk to clients about using life insurance because I'm sold on it myself," Andrew says. The 31-year-old financial consultant has made InFaith the owner of a life contract and named charities in his donor advised fund that will eventually receive the death benefit. [Read more about Andrew and Matt.](#)

## Start the Conversation

Discussing gifts of life insurance with your clients often starts with a few questions that prompt a meaningful conversation.

- InFaith's [Charitable Factfinder](#) includes many questions you can choose from to talk about generosity and legacy planning.
- Share the features and benefits of life insurance gifts with clients using InFaith's [one-page product sheet](#).
- Learn more about FR compensation from Thrivent on the [Charitable Life Insurance page](#) in the Advisor section of InFaith's website.
  - Be sure to review the [Life Insurance Referral Incentive info sheet](#) to review compensation from Thrivent for life insurance gifts to InFaith.

To collaborate on specific legacy planning cases, call InFaith gift planners at 800-365-4172.

*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](http://inFaithFound.org) | p 800-365-4172 | 625 Fourth Avenue South Suite 1500, Minneapolis, Minnesota 55415**

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## RESOURCES

Don't forget to mark your calendars for our [November 7 webinar, "Year End Charitable Planning Strategies."](#)

[Contact a Gift Planner](#)

[inFaithFound.org](http://inFaithFound.org)

[FR Resources Webpage](#)

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