



CONCORDIA
UNIVERSITY
W I S C O N S I N

PREPARE *The Way*

ESTATE GIFTS & ENDOWMENTS: A LEGACY OF FAITH



CONCORDIA
UNIVERSITY
Ann Arbor, Michigan

"...COMMITTED TO HELPING STUDENTS

develop in mind, body, and spirit

FOR SERVICE TO CHRIST IN THE CHURCH AND
THE WORLD."

This mission has been at the heart of Concordia for generations. And generations have supported the mission through current gifts to the Concordia Fund (scholarships for today) as well as through their estates (end of life gifts).

Christians have long recognized the biblical principle of stewardship. Everything that we have is a gift from God and we are His stewards, the ones who care for and direct the use of these gifts. Many of God's gifts, including our financial resources, serve as blessings to us and our families. In addition, we steward His gifts for the benefit of others and to bless them.

For many people, the most significant stewardship decision that they will ever make is the one at the end of this life. Ask yourself, *"When I am called home to be with Jesus, how can all that He has given me continue to bless my family and His work here on earth?"*

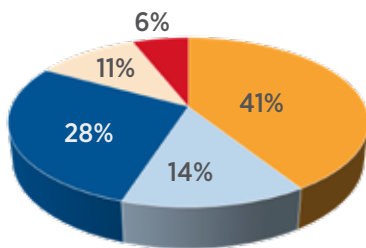
At Concordia University, we are grateful whenever someone makes the stewardship decision to remember us in their estate plans. These generous gifts help our students receive a Christ-centered education and prepare them

to *Live Uncommon*. Our graduates are distinctively different from others and it is our privilege to help prepare the way for them.

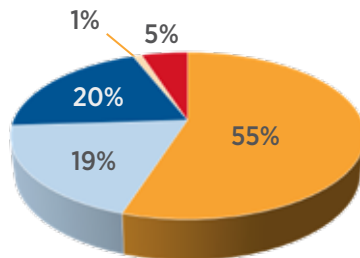
Estate gifts can provide immediate scholarship support, or when used to establish an endowment (which can also be done during your lifetime), will provide financial aid into the future. As the cost of education has continued to rise, estate and endowment gifts have never been more important.



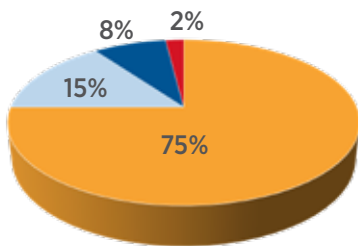
- Net Tuition & Fees
- Room & Board
- Endowment Earnings & Gifts
- LCMS Support
- Federal, State, & Other Support



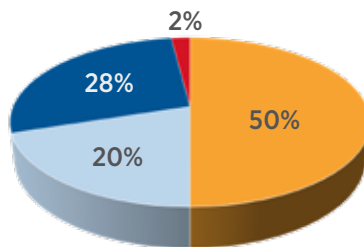
1982 / As Concordia moved into its second century of preparing students for service to Christ in the Church and the world, alumni and friends, especially members of the “Century Club,” gave generously in support of our mission. Additional support from the LCMS allowed Concordia to make the transition from downtown Milwaukee to its new campus just 16 miles north.



2000 / Entering the millennium, rising costs pushed up tuition along with room and board. While the percentage of support from the endowment doubled from 1982, gift income and support from the LCMS were in decline.



2019 / The challenges of providing Christ-centered education have continued to rise and have outpaced endowment and gift income. It is time to prepare the way for the future, where every student seeking a Christian education is able to afford it.



2035 / Our hope is to bring the student and family’s share of tuition down to 50% in the next 15 years. That is truly an ambitious goal, but one that we believe is worth our best efforts and prayers for God’s blessings. With renewed support from alumni, friends, and congregations, we can prepare the way for tomorrow’s students as they prepare to serve Christ in the Church and the world.



PREPARING THE WAY *with Endowments*

Endowments are gifts made to Concordia that are conservatively invested to provide annual support for scholarships, programs, facilities, or special opportunities that arise. A gift to an endowment fund is one way to leave a legacy that will endure.

Endowments offer a great deal of flexibility. In addition to choosing what you would like to support at Concordia, you can decide the size of your endowment gift. There are literally hundreds of existing endowments at Concordia that you can choose to support. Or with a gift of \$25,000 or more, you can name an endowment that supports a program or area of your choice after your family or someone you would like to honor.

Many of our alumni and friends appreciate the multitude of ways to contribute to an endowment. The most common options are:

- **Gifts today:** a gift of any size can be made at any time to any of our existing endowments that align with your interest of support. A gift of \$25,000 or more can also be used to establish a new named endowment as described above.
- **Gifts over time:** if you would like to establish a named endowment but would like to do so over a period of years, a building endowment might



be right for you. Within five years of giving your first gift to establish the endowment, we ask that your fund reach at least \$25,000 so that it can begin to provide scholarships or other aid. Once you've reached \$25,000, you can continue to contribute and even include an estate gift.

- **Gifts at the end of life:** also known as estate gifts, these are often the largest contributions a person will make as they leave a legacy and testimony to their faith.
- **A mix of gifts:** a professional Director of Donor Relations at Concordia can help advise you about how to best combine any of these options to achieve your stewardship goals.

PREPARING THE WAY

with Ministry Focused Endowments

DR. ROSA J. YOUNG OPPORTUNITY ENDOWMENT

Education has always been highly valued among Christians. At a time when education was not so common or readily available, especially for African-American children, a brave young woman of color worked tirelessly to establish Lutheran grade schools across the deep south. These schools created opportunities for young people to receive a great education as well as to learn about Jesus and His love.

In honor of the pioneering work of **Dr. Rosa J. Young**, Concordia University has established an endowment named after her to provide scholarship support to African-American students pursuing professional church work vocations within the LCMS.

DR. JOHN SALESKA ENDOWMENT

The **Rev. John Saleska Scholarship Endowment** was established in memory of Rev. Saleska by the Concordia Bible Institute to provide financial assistance to pre-seminary students attending Concordia University Wisconsin. This endowment will help future pastors carry forward Dr. Saleska's lifelong conviction of teaching "Christ in Every Word" as they receive a great theological education and are well-prepared to serve the Lord as pastors.

PASTOR HECKERT ENDOWMENT

The **Concordia Ann Arbor Pastor Heckert Scholarship Endowment** has been established to help future pre-seminary students complete undergraduate theological training. It is named in honor of Rev. Dr. Jakob Heckert, who served as a member of the faculty of Concordia University Ann Arbor for nearly 40 years as a beloved professor of New Testament and Biblical Languages. Dr. Heckert impacted countless lives as he shared God's love with *everyone*.



PREPARING THE WAY

Through Your Estate

The most significant stewardship decision most people will make is what to do with God's blessings when the Lord calls them home. We are grateful to the many alumni and friends who have included Concordia University in their estate plans with a generous gift. When the decision is made during your lifetime, you are in full control of deciding how that gift will be used in the future, whether to fund current needs, scholarships, or endowments.

Concordia University is most commonly included in an estate gift in any of the following ways:

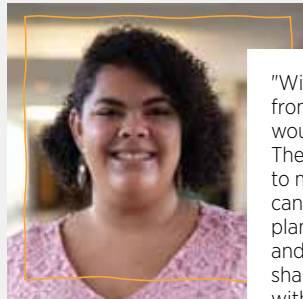
- **WILL BEQUEST:** most commonly, a percentage of your estate is designated for the benefit of Concordia University. Your legal advisor can complete the necessary paperwork.
- **TRUST BENEFICIARY:** offers many options for supporting ministries like Concordia and is best discussed with your attorney and financial advisor.
- **LIFE INSURANCE:** a simple way to bless our students and ministry is to name Concordia University as a full or partial beneficiary of a life insurance policy. You can even gift the policy to Concordia University during your lifetime.
- **RETIREMENT ACCOUNT (401k, 403b, IRA, Roth, etc.):** as with life insurance, this is a very simple way to extend a gift to Concordia by simply naming us as a full or partial beneficiary of one or more of these accounts.

Estate planning can range from very simple to very complex. Concordia University is well equipped to provide educational information about your options but you are always encouraged to discuss your plans with your legal and financial advisors.



"Because of the generosity of people who invested in the future of church worker students, I was able to graduate from the Lay Ministry program and go on to become an LCMS deaconess."

**CHRISTIANA
(WOLTERS) EWERT**
Alumna '14



"Without the amazing gifts from pure-hearted donors, I wouldn't be here at Concordia. These people are Godsend to me and my family. While I can't thank them enough, my plan is to pay their generosity and blessings forward by sharing what I've received with others."

OLIVIA CROOKS '22

THE

Heritage AND Krieger Societies

At each of our residential campuses, Concordia University has established special recognition for those who have established an endowment (funded now or in the future) or who have included us in their estate plan.

The Heritage Society (CUW) and the Krieger Society (CUAA) recognize those who not only support Concordia University today, but are committed to seeing our ministry extended into the future. Members of these societies believe that having more people receive a Christ-centered education will benefit our nation and give glory to God. Through their thoughtful planning, future generations will continue to be blessed and God's kingdom extended.



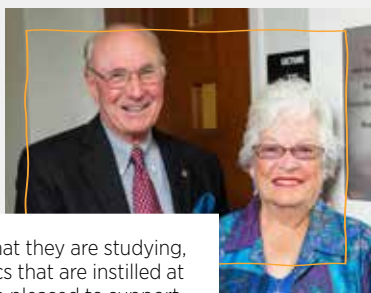
"Smaller colleges, like Concordia, help students gain the confidence to speak up in class and try new things. Students at Concordia get to grow and learn in a place filled with God-fearing people who want to love and serve the Lord."

KAY THUNDER-HAAB
Donor, Krieger Society



"As I study to become a pastor, I am constantly reminded that we serve an amazing God who cares for his children. Our donors are one of those reminders and I would not be able to be here without their support."

GARRETT ANKLAM '22



"Regardless of what they are studying, we value the ethics that are instilled at Concordia and are pleased to support them. We've been blessed, and we pray to be a blessing to others."

RON & MARVEL JONES
Donors, Krieger Society



"We are proud of our children and grandchildren, and happy that our three children all graduated from CUW and are Lutheran Educators. We realized that establishing an endowment would be a good way to help future students become teachers."

JIM & CAMI JUERGENSEN
Donors, Heritage Society

Dear friends,

Concordia University has been blessed with so many alumni and friends who embrace our mission of 'helping students develop in mind, body, and spirit for service to Christ in the Church and the world.' They believe, as we do, that now more than ever our world needs Christian leaders who are grounded in biblical truth. Because of these shared values, they generously support our students today through the Concordia Fund and into the future with endowment and estate gifts.

If you have not already done so, please accept this invitation to talk with a Director of Donor Relations who can help you with your plans to extend the mission of Concordia with endowment or estate gift support. And if I can be of service to you at any time, please contact me at roy.peterson@cuw.edu.

God bless and keep you,



Rev. Dr. Roy Peterson
President
Concordia University Foundation



**For more information about endowments or estate gifts,
please contact any of our planned giving specialists below.**

CUW

Tim Brever	262.243.2130
Greg Fictum	262.243.4540
Cori Guerin	262.243.2010
Jeff Klocko	262.243.2170
Dean Rennicke	262.243.4580

CUAA

Susan Anthony-Whitcomb	734.995.7589
John Richert	734.995.7374
Linda Sproul	734.995.7491

GIVE ONLINE AT CUW.EDU/GIVE or CUAA.EDU/GIVE