

What Is the Mt. Zion Endowment Fund?

In 1998, Mt. Zion established an Endowment Fund to build on the blessings God has bestowed on us as a community of faith. This fund is separate from the general day-to-day operational requirements of the church and it is not intended to interfere with or supplement the regular stewardship or other programs of the church.

What Is The Purpose of The Fund?

The purpose of the Endowment Fund is to further the mission of Mt. Zion.

What Is An Endowment?

An endowment is defined as a permanent fund, the principal of which is kept intact, but the income can fund the charitable organization's programs.

As the name implies, the Endowment Fund builds a financial base for our church for years to come . . . And for today.

Why An Endowment?

Endowments are attractive to donors since their donation will be maintained in perpetuity and not expended short-term. An endowment gives an organization credibility, because

it shows the congregation of the church that it will be there in the future.

How Is The Mt. Zion Endowment Fund Managed?

The Fund is managed by a separate committee consisting of five members. It is the duty of the committee to manage and control the assets of the Fund, insuring that the assets are properly handled, invested and disbursed based on recommendations and approval from the Church Council.

How can I Make a Gift?

Gifts can be made to the Endowment Fund in several ways that usually fall into one of the following categories:

Cash

Money, usually in the form of a check, is probably the most common and popular type of gift. A charitable gift of money may be tax-deducted in the year it was made.

Non-Cash Property

Property other than cash such as real estate or securities, including mutual funds, certain bonds and stock, may help one make a larger gift at less cost. A charitable gift of appreciated property may enable one to avoid the capital gains tax.

Wills

A will can include:

Charitable causes as recipients of gifts of cash, property, securities, works of art, **OR**

A percentage of an estate **AND / OR**

The "residue" of an estate, property remaining after other bequests have been made.

Life Insurance

There are several ways to give through life insurance and commercial annuities. Ask a life insurance representative or a member of the Endowment Fund Committee for more details.

If you wish to make a donation, fill out the form below and mail it to:
Mt. Zion Lutheran Church
Endowment Fund
12012 West North Avenue
Wauwatosa, WI 53226
or call (414) 258-0456 for more information.

We encourage you to discuss your gift with your financial advisor.

When we honor friends and loved ones with a memorial or gift to the Mt. Zion Endowment Fund, we provide a remembrance forever.

I / We Give to Mt. Zion Lutheran Church Endowment Fund:

1. The sum of _____ dollars \$ _____

2. Securities as follows: _____

3. Other property as follows: _____

Date: _____ Signed: _____ Phone Number: _____