

## How to Give Your Gift

Once you have decided to make a gift, you can advise SOTV how you want your gift allocated between the General Mission, Education, or Outreach Missions sectors by completing a letter of intent. A sample letter is available in the SOTV Finance Office.

You may also provide your own instructions about how you want your legacy funds deployed. However, it is recommended to discuss with SOTV finance staff to ensure those instructions achieve your intended objectives.

For more info, contact Dawn Della Paolera at 952.985.7315 or refer to the SOTV Endowment Fund webpage at [sotv.org/endowment](http://sotv.org/endowment).

**Make a lasting statement of your faith and values by supporting the mission of Shepherd of the Valley (SOTV) by naming the SOTV Endowment Fund as a beneficiary in your will.**



*And God is able to make all grace abound to you, so that in all things at all times, having all that you need, you will abound in every good work.*

2 Corinthians: 9:8



**We invite you to consider including the SOTV Endowment Fund in your estate plans.**

By including SOTV Endowment as part of your legacy, you will have the satisfaction of knowing you are helping to provide ongoing support for the church you love into perpetuity.



**Connect with us!**

**Shepherd of the Valley**  
Lutheran Church

12650 Johnny Cake Ridge Road  
Apple Valley MN 55124  
[www.sotv.org](http://www.sotv.org)

**Shepherd of the Valley**  
Lutheran Church

# Endowment Fund



*Your Legacy Matters!*



# Building a Legacy of Love and Service at SOTV



**Members of Shepherd of the Valley Lutheran Church (SOTV) re-established the Endowment Fund in 2015, charging it with the purpose of fulfilling and serving the mission of the church by receiving and administering bequests, estates, insurance, and other assets to be perpetual and perpetuating.**

The Endowment Fund holds gifts in perpetuity, providing much needed funds through earned income on the investment of these funds. This ensures your gift to the fund helps in service to God, not only today, but for generations to come.

## Endowment Fund Designations

The Charter of the Endowment provides for donors to support missions most important to them by designating their gifts to one or more of three endowment fund sectors.

### General Mission:

Supports worship, music, and church facilities.

### Education:

Christian education of youth and adults, bible studies, programs for the general community, scholarships (including summer camp), and other general education activities.

### Outreach Ministries:

- ◆ *Local Mission* - including food shelf, support of youth, and persons in need of special services.
- ◆ *Domestic* - service trips and other support for persons in the United States.
- ◆ *Global Mission* - including activities supported and/or endorsed by SOTV.

Gifts to the Endowment Fund will ensure that SOTV will impact our community by living out our vision today, tomorrow, and for generations to come.

## For additional information

and/or to document your gift, please request our Letter of Intent for future gifts to the Endowment Fund.

## Questions?

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Shepherd of the Valley Lutheran Church  
12650 Johnny Cake Ridge Road  
Apple Valley, MN 55124

## Ways to Make a Legacy Gift

Your gift to the Shepherd of the Valley Lutheran Church Endowment Fund (SOTV Endowment Fund) should be customized to best fit your particular circumstances and goals for making a gift. Some examples are shown below.

### Bequests by Will or Trust

Provide for a bequest to **SOTV Endowment Fund** in your will or estate plan.

### IRAs and Retirement Benefit Plans

Designate **SOTV Endowment Fund** as a beneficiary of your IRA or other retirement plan.

### Life Insurance

Designate **SOTV Endowment Fund** as a beneficiary of a life insurance policy or transfer ownership of a life insurance policy to the **SOTV Endowment Fund**.

### Stocks, Bonds, Real Estate, Other Assets

Transfer appreciated assets (stocks, bonds, real estate, etc.) to the **SOTV Endowment Fund** typically without incurring capital gains tax on the appreciated value (however, consult your tax advisor).

### Cash

You may make gifts of cash to the Endowment Fund or pledge a gift to the Endowment Fund to make contributions over several years. Either use the tear-off form to the right, visit [sotv.org/give](http://sotv.org/give), or text 73256 and designate the "Endowment Gifts" fund.

Cut here

## Ways to Make a Current Gift

You may make a current gift of cash or other assets at any time by using this form. Many people have found it meaningful to make a gift to honor a loved one upon their death. You can also make gifts in thanksgiving for births, baptisms, graduations, and other events.

Please designate **SOTV Endowment Fund** on the payee line of your check, and include this tear-off form in an envelope with the check.

You can also give one time or schedule recurring gifts online. Visit [sotv.org/give](http://sotv.org/give) for more information.

This gift is to honor:

\_\_\_\_\_  
Name, event, etc.

I designate my gift as follows:

\_\_\_\_\_% Endowment Committee Discretion

\_\_\_\_\_% General Mission

\_\_\_\_\_% Education

\_\_\_\_\_% Outreach Ministries

Gift given by:

Gift amount:

\$\_\_\_\_\_ Date:\_\_\_\_\_