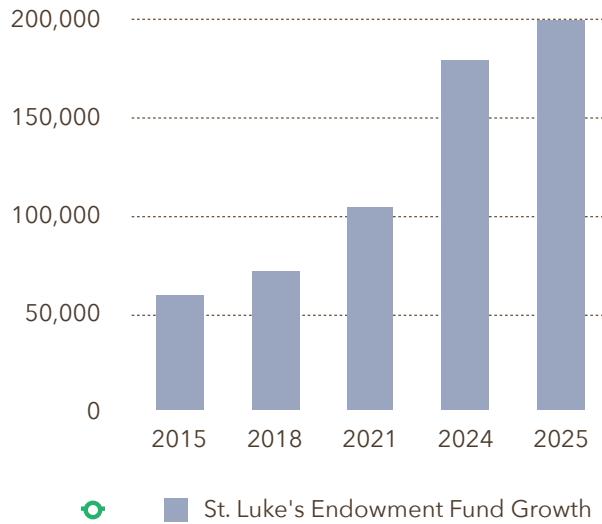


ST. LUKE

Endowment Fund



Our Endowment Fund exists to support the work and future of St. Luke's by funding ministry improvements, church worker scholarships, and outreach opportunities from the earnings of the fund.



OVERVIEW

The Endowment Fund at St. Luke's provides financial support for:

- ✓ Members Preparing for Church Work
- ✓ Ministry Improvement Projects
- ✓ Outreach and Mission Opportunities

DISBURSEMENTS

- ✓ 2013: Organ Fund
- ✓ 2016: Scholarship for CUI Student
- ✓ 2017: Lutheran Social Services & Eagle Prep
- ✓ 2018: Scholarship for Seminarian
- ✓ 2019: Oasis Remodel Work
- ✓ 2020: Operation Big Serve & Church Plant
- ✓ 2021: Sanctuary A/V Booth Expansion
- ✓ 2022: Vicar & Titus Foundation
- ✓ 2023: Vicar & ASU International Ministry
- ✓ 2024: Vicar, ASU Int'l Ministry, SHP, Organ
- ✓ 2025: Vicar, ASU Int'l Ministry, Bridge Builder

LCMS FOUNDATION

St. Luke's is blessed to partner with Brian Hyde from the LCMS Foundation for cost-free assistance in gift planning. Brian personally meets with people at St. Luke to get to know their story and passions, and then guides them through a four-step process to develop their *Lifetime Plan for Giving*.

Brian is a senior gift planning counselor who has worked at the LCMS Foundation for over 20 years. He is a member of Faith Community LCMS in Las Vegas, and can be reached at 209-613-2125.

ENDOWMENT FUND TEAM

Job Description Summary

MEETING SCHEDULE

The Endowment Fund Team meets at least three times a year. The primary focus (in addition to general management) for each meeting is:

- ✓ January: Annual Report & Applications
- ✓ May: Disburse Funds
- ✓ October: Plans for Publicity

RESPONSIBILITIES

Promote Awareness of the Fund. This is done at both a congregation and individual level. Congregational promotion includes announcements, publications, and the Legacy Tree. Individual promotion includes working with Brian Hyde from LCMS Foundation to identify and reach out to specific members who may be good candidates for the *Lifetime Plan for Giving* process.

Manage the Fund. Wise stewardship of the Endowment Fund requires a balance between risk, growth, and fees for the fund. Regular reviews are needed to ensure the fund makes healthy earnings while being positioned for long-term success. An annual report is given to the Council with an overview of the fund's growth and disbursements.

Disburse the Fund's Earnings. To be active in all three dimensions of disbursements (scholarships, improvements, missions) may require asking for applications and/or selecting a dimension area to highlight. When disbursements are made, it is important to communicate and celebrate this with the congregation.

TEAM MEMBERS

The Endowment Fund Team serves as a standing Ministry Action Team of the St. Luke's Church Council. It is granted full authority over the fund, but ultimately reports to the Council.

The team is comprised of five members. In addition to the current Assistant Director and Treasurer of the Council, three other people from St. Luke's serve in rotating three-year terms. This means only one person from the congregation needs to be appointed to the Endowment Fund Team each year.

The Endowment Fund Team has three officers: a Chairman, Treasurer and Secretary. The team appoints its own Chairman and Secretary, and the Council Treasurer serves as the Treasurer.