

WHAT'S YOUR PLAN?

ESTATE PLANNING GOALS

An important step in setting up an estate plan is putting down on paper the various goals we have as individuals or couples. These goals include family and other heirs, Power of Attorney for Health Care, Power of Attorney for Finances, and much more.

The following are some of the common goals shared. This list will assist your in your thought process and then also in the ranking of your goals.

GOALS	HIGH RANKING	MEDIUM RANKING	LOW RANKING
Establish guardianship for minor children			
Increase current income			
Reduce estate taxes			
Provide for my congregation			
Provide for other ministries			
Provide for healthcare if disabled			
Sell appreciated assests tax-free			
Plan for my business			
Other goals...			



divine redeemer

MINISTRY
endowment fund

MINISTRY ENDOWMENT FUND

Board Appointed Members:

Dennis Pordon – Chairman
Paul Flaa – Financial Secretary
Dave Lange – Secretary
Jerry Maas – Member
Mike Prevallet – Member

Standing Committee Members:

Pastor Jeff Schubert - Executive Pastor
Ed Eldridge – COO/CFO
John Raasch – President-Board of Directors

Divine Redeemer Lutheran Church & School
31385 W. Hill Rd., Hartland, WI 53029
262-367-8400 • www.drhc.org

ESTATE PLANNING GOALS