

CHARITABLE GIFT AND WILL PLANNING

Establish an estate plan that honors God, cares for your loved ones, upholds your values and extends your eternal impact through your favorite ministries. Gain clarity, save time and perhaps even reduce legal costs by working through the complexities of your situation with a trusted Barnabas Foundation planner who cares about your needs and shares your biblical worldview.



Together, we'll discuss answers to important questions like...

- Does my will reflect my current needs and goals?
- How much is enough for my loved ones?
- How do I best provide for children or grandchildren with special needs?
- How can I ensure my values are passed to the next generation?
- Am I taking full advantage of charitable tax laws?
- How can I extend my impact through my favorite charities?
- What do I want my legacy to be?

Walk away with practical recommendations and clear-cut action steps to help you streamline the process of finalizing your legal documents with your chosen attorney.

Confidence and Trust

Since 1976, Barnabas Foundation has helped thousands of generous Christians transfer their God-given wealth to loved ones and the ministries close to their hearts.

We will answer your specific questions and provide clear, easy-to-understand information in an atmosphere of confidentiality and trust.

Rest easy knowing that your plans are in order and will accomplish the greatest good—for your family and for God's Kingdom. Our experience and knowledge may help you save taxes, minimize family disputes, provide for a disabled family member, transfer a family farm or business and avoid probate expenses and delay.



Tax-Wise Charitable Giving

Barnabas Foundation planners will also help you explore the various tax-wise planned giving options available to you, in a way that is clear and easy-to-understand.

- Learn how you can support your favorite ministries while receiving income for life.
- Determine whether gifting appreciated assets—such as real estate, retirement benefits, stocks or commodities—will reduce your taxes.

Using Barnabas Foundation as a Giving Channel

You may wish to leave gifts to more than one ministry. One simple way to accomplish this is to name Barnabas Foundation as the charitable beneficiary in your will.

We'll ask you to provide us with a "Distribution Request Form" naming the organizations that will ultimately benefit from your gifts. On this form, you can specify the amount or percentage of your estate that should go to each charity. You'll have the flexibility to change this form at any time without the hassle or expense of having to amend your legal documents. When you go to be with the Lord, we'll help ease the burden for your loved ones, handling all the distributions to your favorite ministries on your behalf.

A Gift to You

Our planning services are offered at no cost and with no obligation to you, because of your support of one or more of our member organizations.

In this process, we...

- Never ASK for a donation
- Never SELL any financial products
- Never SHARE your financial or personal information
- Never CHARGE you for planning services

What Others Are Saying

"I am a widow, and finances are not my strong point. My Barnabas Foundation planner put it in language that I could understand...I now have my estate all planned and filed away by one of the law firms he recommended. It feels good to have my 'end of life' paperwork put together. The people at Barnabas Foundation are wonderful! They made me feel welcomed and cared about. Thank you!"

– Beverly F.

"The process was well-planned and convenient to our schedule. The professionalism was outstanding, and all the suggestions have been implemented."

–Mike W.

Creating a Legacy Blueprint The Planning Process

1. Initial Planning Meeting

Discuss your goals and review your estate plan with an experienced Barnabas Foundation planner who cares about your needs and shares your biblical worldview.

2. Create a Blueprint

Barnabas Foundation will provide you with a detailed summary of your conversation, as well as helpful tools and action steps to help you execute your plan. You'll receive thorough documentation that you can provide to your attorney for preparing your legal will. This document may save you time, hassle and legal costs since you've already contemplated the specifics of your plan with your Barnabas Foundation planner. If you don't already have an attorney to finalize your will, we can provide recommendations from your region.

3. Ongoing Consultation

Continue to communicate and meet with your Barnabas Foundation planner to review updates and changes to your estate plan, as required by life's circumstances and your changing goals.

4. Distribution

Barnabas Foundation will simplify and streamline your giving, by serving as the distribution channel for your charitable gifts to your favorite ministries.

LEARN MORE

To begin your confidential conversation with a Barnabas Foundation planner, call us today at 888.448.3040 or email planning@BarnabasFoundation.org.