COVENANT TRUST

# Supporting the Midwest Conference, its churches, camps and ministries

Covenant Trust, through Covenant Estate Planning Services, coordinates the legacy planning and deferred giving efforts for the churches, bible camps and ministries in the **Midwest Conference**.

Since 1978, we have distributed over $246 million from client legacy plans to all Covenant programs, education, camps, missions and churches.

## FACTS ABOUT COVENANT TRUST AS DECEMBER 31, 2020

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| **$6 Million**—designated to churches, bible camps and ministries in the **Midwest Conference** by our clients in their legacy plans |
| **$2 Million**—already distributed from client legacy plans to **Midwest Conference** churches, bible camps and ministries through Covenant Trust since 1978 |
| We care for **3,831** accounts/clients |
| Over **$2 Billion** under our care |
| **48%** of ALL future dollars from legacy plans created in 2020 are designated to churches, conferences and conference ministries |
| **$72 Million**—total future dollars designated for local ministries |
| **$31 Million**—already distributed to local ministries including conferences, conference ministries and local Covenant churches through Covenant Trust since 1978 |
| **$220 Million**—total future dollars for all Covenant ministries as of December 31, 2020 |
| **$246 Million**—already distributed to Covenant denominational ministries through Covenant Trust since 1978 |

**Covenant Trust wants to be the provider of choice for financial resources for your ministry, your staff and your supporters. Turn over to see the many ways we can help.**

141 W. Jackson Blvd. / Suite 1850A / Chicago, IL 60604 800-483-2177 **covenanttrust.com**

COVENANT TRUST

# Partnering with your ministry

It takes a lot to keep the spirit and fruitfulness of your ministry alive. From leaders to staff to volunteers, their support is invaluable. Not only that, how do you obtain the needed financial expertise and resources?

### *Look to Covenant Trust*

Covenant Trust is the trusted financial partner you can count on to help your church further its mission. We have financial services representatives in each Regional Conference that will work with you to:

- preserve and grow current investment resources
- generate and manage new resources for the future
- support pastors and their congregation in achieving their personal financial goals and charitable aspirations

**What we can do for your Ministry:**

- Investment portfolios
- Endowments—establish and invest or manage existing funds
- Talk to your congregation about money and stewardship
- Legacy planning and charitable giving guidance
- Donor education and gift planning

**What we can do for Pastors and your Congregation:**

- Personal investment management
- Trusts and trustee services
- IRAs/Retirement accounts/Rollovers
- Estate planning documents
- Gift planning
- Social Security strategy planning
- Financial education seminars for Women, Seniors, Young investors and Boards

**To learn more, visit covenanttrust.com or contact our Financial Services Representative serving the Midwest Conference**

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