LSS Foundation, Inc.

(262) 794-7810 • LSSFoundation@lsswis.org

6737 W Washington St, Ste 2275
Milwaukee, WI 53214

LSS Legacy Giving Challenge Grants

Your compassionate care and support for the neighbors served by LSS can continue beyond your lifetime, for generations to come, when you establish a "planned gift" through your will or estate plan. What's more, your legacy gift can also *make an immediate impact now* for the mission of LSS thanks to a challenge grant established by a longtime friend and member of the Board of Directors of Lutheran Social Services of Wisconsin and Upper Michigan.

This generous donor has pledged to give **a $10,000 challenge grant to the LSS Foundation in honor of each individual or couple who notifies LSS of a planned gift in writing** between October 1, 2026 and September 30, 2027, up to a total gift of $500,000. Qualifying planned gifts may be for the benefit of either Lutheran Social Services of Wisconsin and Upper Michigan, Inc. or the LSS Foundation, Inc.

Help for today and hope for tomorrow

This gift to the LSS Foundation will invest in a vision of **forever support for neighbors in need**: the military veteran who heroically served our country, now facing homelessness; the refugee family forced to flee home searching for safety in a new land; the young mother experiencing addiction who needs treatment so she may return to her children; and so many others in our communities who find themselves going through hard times and in need of a helping hand.

Investment earnings from contributions given to the LSS Foundation currently provide more than $1.5 million in annual support for the LSS mission through general funding and special project support. By participating in the LSS Legacy Giving Challenge and earning a grant to the LSS Foundation given in your honor, you will help that support grow right away – and continue sustainably for years to come.

What do I need to do to qualify?

A gift of $10,000 will be given in your honor to the LSS Foundation after you provide us with a copy of your signed and completed **Planned Gift Statement of Intent** form and have a conversation with a member of our Advancement team to confirm our understanding of the information you've provided and your intent for the gift.

Please return your Planned Gift Statement of Intent form to:

Lutheran Social Services
Attn: Advancement Department
6737 W Washington St., Suite 2275
Milwaukee, WI 53214

or via email to: donorservices@lsswis.org
A member of the Advancement team will follow up with you.

Additional paperwork, such as a copy of a beneficiary designation form or the pertinent page of your will, is helpful but not required. Our team can review your document for accuracy and recommend wording to ensure your gift will be received and used as you intend, and we can keep such documentation on file with your statement of intent. *LSS/LSS Foundation does not provide legal, tax, or financial advice. We encourage you to consult with your attorney, accountant, and financial advisors as you complete estate and charitable planning.*

Which gifts qualify for the LSS Legacy Giving Challenge?

- **Gifts in wills** – You can find sample bequest language at ***lsswis.org/bequest***.
- **Beneficiary designations** – Designating a charitable beneficiary for assets and accounts such as retirement plans, investment accounts, life insurance, and donor advised funds is **simple** to do, and is often a **tax-smart** estate planning strategy. You can find the process and information typically required at ***lsswis.org/beneficiary***.
- **Life income gifts** such as charitable trusts or charitable gift annuities.
- **Other planned gifts may also qualify,** to be determined on a case-by-case basis. Please discuss your planned gift with a member of the LSS Advancement team.
- Generally, gifts that will be given to LSS/LSS Foundation after the passing of the individual, spouse, and/or other dependents will qualify for a challenge grant. Gifts with more complex contingencies will be considered on a case-by-case basis.

Your partnership means so much to neighbors in need. Thank you for your legacy gift.