



WELS Foundation
Wisconsin Evangelical Lutheran Synod

Endowment funds

A legacy of ministry support
for generations to come



Congregations pray for thriving ministry—strong schools, vibrant outreach, well-maintained facilities, scholarships for students, and resources to share the gospel. But annual budgets shift and ministry needs continue to grow, making long-term planning challenging.

Why endowments matter for ministry

An endowment creates a reliable source of financial support—strengthening ministry today while building a foundation for tomorrow.

Congregations can open an endowment fund with **\$25,000**. Afterwards, members may contribute any amount—large or small—through the congregation.

WELS Foundation also helps congregations share tax-wise giving strategies that allow God's people to give more effectively—beyond cash—such as **appreciated assets, stock, real estate, or planned gifts such as bequests or beneficiary designations**. These strategies may reduce taxes while increasing the long-term impact of gifts—supporting gospel work for generations.

Behind the scenes, endowment assets are professionally invested through **WELS Investment Funds** which brings more than 25 years of experience, serves more than 260 WELS ministries,

and manages more than \$350 million in assets. This disciplined, long-term investment management is designed specifically for WELS ministries.

Congregations receive an annual distribution each July equal to 4% of the fund's prior 16-quarter (or since inception) rolling average market value. Endowments balance long-term growth with dependable ministry support.

Support when you need it

Congregations and members never walk this path alone. Your **WELS Christian giving counselor** is available to answer questions, explore giving options, and assist with endowment promotion.

To help congregations communicate effectively, WELS Foundation provides **bulletin-ready messages, communication tools, and an Endowment Fund Media Kit** filled with templates and resources.

An endowment fund creates a legacy of ministry support—today, tomorrow, and for generations.

Learn more about starting or growing an endowment by contacting WELS Foundation or your giving counselor.

Executive Director Jim Holm, CFP®
jim.holm@wels.net | 414-256-3206

Program Administrator Kyle Bartsch, CAP®
kyle.bartsch@wels.net | 414-256-3212



Scan to learn about
giving options.
Visit wels.net/foundation.