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Legacy Charity Alliance

"Bring the whole tithe into the storehouse, that there may be food in my house. Test me in this," says the LORD Almighty, "and see if I will not throw open the floodgates of heaven and pour out so much blessing that you will not have room enough for it." Malachi 3:10 (NIV)

Dear Friend in Christian Ministry;

More than 15 years ago I was called to a ministry of helping people redirect resources away from estate taxes and unnecessary costs arising at death and toward their loved ones and the Kingdom. By God's blessing one small effort after another, more than $75 million has been redirected to Christian charities.

Our primary focus is to conduct complimentary workshops in which we explain in plain English how each of us can avoid the unnecessary expenses and delays of probate and all estate taxes. There are many tools and techniques to avoid these unnecessary expenses and taxes, but they have to be implemented while we are alive and well to work properly. Our workshops present a blend of biblical and legal principles which stir participants to get their estate plans in order and consider what God would have them do with the resources that He has entrusted to them. At the end of the presentation, we provide tools to assist participants in finding an attorney to accomplish their goals.

This often leads to additional giving which is otherwise not possible. The Lord has blessed this teaching, and has caused more than $1 million (that we know of) to be given to His work as a result of *each* of the past four workshops we have conducted. We find that the discussion of planned giving through estate planning usually increases current giving, and many of our tools and techniques use current giving to increase inheritances to loved ones.

If you would like to meet with me or review the seminar materials, please call me now at 847-490-8450.

> "Rodney's passion for the gospel and kingdom work is matched by his desire to meet each Christian's estate planning needs individually and completely."
>
> Jack Edgar, President and CEO, Awana Clubs International

"Mr. Piercey brings a wealth of knowledge and experience to each seminar and is able to articulate the details of Estate Planning in layman's terms, so we all can understand. The seminars that we have held have benefited a large group of our people and in long term will enhance the ministry by special remembrances. I highly recommend Mr. Piercey to you as a very dedicated Christian with great knowledge and expertise in Christian Estate Planning."

Bruce Love, Associate Pastor, Wheaton Evangelical Free Church

"I value his Christian approach. It is important to me that he encourages people in their estate plan to consider the local church. In my estimation, Rodney is the best resource available to anyone to do estate planning."

Judson P. Olson, Minister of Administration, Evangelical Free Church of Naperville

Wealthy donors are passing away every day and leaving a significant portion of their estates to the IRS and to their probate lawyers. The Federal estate tax starts for all assets valued over $3,500,000 at a 45% tax rate. The 2001 estate tax law purports to eliminate the Federal estate tax, and actually does for the year 2010, but unfortunately the law is self-repealing the very next year. There are currently at least seventy tools and techniques approved by the courts and the IRS which can be used to totally eliminate estate taxes and which do not depend on the new tax law.

In addition, probate costs routinely run from 3% to 8% of probated estates, and can be eliminated with proper planning. Last, but not least, business owners are selling their businesses and paying up to 20% in capital gains taxes, which could also be avoided with proper tax-elimination planning.

Why does this situation exist? ***Because Christians generally do not know that they have the choice to opt out of paying probate costs and estate and capital gains taxes***.

"We received a lot of very positive feedback from those that attended [the seminar], and know that both the church members and the church itself will benefit greatly from [Rodney's] presentation."

Jim Meister, Director of Ministry Support, Victory in Grace Ministries

"[Rodney] has a heartbeat for the things of the Lord. Let's face it, that's important. That helps you really trust him and his team."

Art Rorheim, Founder, Awana Clubs International

The Legacy Advisor Group is a group of professionals designed to help Christians around the country learn about their stewardship choices in estate tax elimination planning, capital gains tax reduction, and income tax reduction through time-tested financial and legal tools. We have found that most donors make better planning choices once all their planning and giving choices are explained. Your charity will almost always benefit from this type of planning, because tax dollars are redirected away from the IRS and to charities in which donors are involved and love.

For example, suppose one of your donors is a single woman who has been a friend of your charity, who recently passed away. If her estate was worth $5.6 million, her estate has to pay over $900,000 in federal estate taxes. A single individual is only entitled to pass $3.5 million to heirs without a federal estate tax. Although each state's death tax laws are different, many states use the same limit as the federal limit. The federal estate tax on her estate would be due within 9 months after her death. If she had known that she could give more to her family and eliminate all her estate taxes, she probably would have done so.

With the **Legacy Charity Alliance**, we will commit to work with the leadership of your charity to develop strategies to introduce your Board and your donors to various planning opportunities that may allow them to leverage their current and planned giving. Your donors will receive additional tax benefits they would not otherwise have received. Here are some strategies which have proven fruitful in the past:

- Special newsletters that can be sent out by your charity updating donors on changes to the laws and tools currently available.
- Stewardship seminars where donors are made aware of trends, what the Bible has to say about estate planning, and how changes to the laws affect their estate plans.
- Donor-centric web site consulting, keyword mapping and conversion analysis to determine the most fruitful strategies available for your web presence.
- Donor response and contact where a senior attorney from Legacy Advisor Group will meet with your charity's leadership and explore the benefits to your charity and your donors from this type of planning.
- Development Team seminars where a Legacy Advisor Group team member will meet with your Development Team for 2-3 hours and educate those answering calls from donors about tools and benefits available to donors for making gifts such as Charitable Remainder Trusts, Gift Annuities, or Charitable Lead Annuity Trusts in the context of the four taxation layers and how to identify opportunities for these tools and techniques.

We find that after donors are introduced to these concepts, they are very appreciative of the tangible financial benefits the ministry they support has brought them, and more often than not the donors express that appreciation to the ministry through increased current giving.

Take the next step and get information about the **Legacy Charity Alliance**: please call me now at 847-490-8450.

In and for our Savior,

Rodney H. Piercey