

Since 1976, Barnabas Foundation has been advancing God's kingdom by providing quality Planned Giving and Estate Planning services. The goal is to help caring Christians strengthen support for the ministries of nearly two-hundred member organizations.

Our Perspective ...

is biblical. We provide guidance and assistance to Christians of all ages and generations to help them grow in their understanding of biblical stewardship and experience the joy of living a generous life. Stewardship of our personal resources is an important biblical principle for all believers regardless of economic status or age.

Our goal...

is to assist you in the development and preparation of an Estate Plan that best fits your family needs. That is, to make sure that upon your death, the assets God has entrusted to you are managed and distributed in a way that honors God, provides for your family, minimizes taxes and communicates your values to your family and your world.

Our Christian Commitment...

is to advance God's kingdom by sharing quality Planned Giving expertise with Christian families in an atmosphere of trust and confidentiality. In this process we:

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

Our Services

ESTATE AND GIFT PLANNING

Part of good stewardship is making sure that our assets are managed as well when we're gone as they were when we were alive. With that in mind, professionals from Barnabas Foundation will meet with you in a private setting. We will answer your questions about Wills and Estate Planning. We'll help you work out a plan to meet your individual and family needs, as well as to give to Christian charities that are important to you.

WHAT WE OFFER

Experience and Expertise

Since 1976, we have helped Christians support ministries that are important to them. By working with donors and our member organizations, we have discovered what kinds of information and services are most beneficial.

WHAT WE PROVIDE

Answers to specific questions

Most people have questions about Wills, Trusts and estate taxes. They're interested in learning more about planning options for their own particular family situation.

Estate planning visit

During this discussion, a family's entire situation is evaluated. This may result in a first Estate Plan or may update an existing one.

Estate planning expertise

Our experience may help save taxes, minimize family disputes, or protect elderly parents. It may help you provide for a disabled family member, transfer a family farm or business, or avoid probate expenses and delay.

About Barnabas Foundation (continued)

Our Estate Planning Process

1. Meet to discuss your goals and review your Estate Plan.
2. Provide an analysis to assist your attorney in preparing your Estate Planning documents.
3. Meet to review updates and changes to your Estate Plan as required by circumstances.
4. Serve as the distribution channel for your charitable bequests and/or planned gifts.

HOW WE WORK WITH INDIVIDUALS AND FAMILIES

We help Christians accomplish their individual and family Estate Planning goals.

This means that income needs and requirements are considered in each plan. Attorneys, knowledgeable in charitable giving benefits as well as estate plans, facilitate the process.

We assume complete confidentiality in the planning process.

Individuals feel secure in providing us with necessary information to develop an Estate Plan because the planning is objective and independent, and all information is confidential. Financial details and family situations are not disclosed to any organizations.

We do not sell or promote any particular financial or investment products.

Nor do we refer people or companies offering investment products.

Our planning services are provided at no cost.

We offer our services free-of-charge and with no obligation, thanks to the annual contributions made by the Christian member organizations of the Foundation.

We do not ask for gifts.

No gifts to Barnabas Foundation are either solicited or encouraged. We do no fundraising for ourselves or other organizations as part of the planning process.

ESTATE PLANNING CHECKLIST

Your Will or Trust should be reviewed annually. A Barnabas Foundation professional estate planner will be pleased to answer your questions.

- ✓ Does it reflect what's important to you and your family?
- ✓ Is it up-to-date with current tax laws?
- ✓ Does it appropriately provide for your children?
- ✓ Are Executor-Trustees named still valid?
- ✓ Does it include your favorite charities?
- ✓ Are unnecessary taxes eliminated?



The Barnabas Foundation works with TEAM to provide Estate Planning services for TEAM's friends and financial partners.

*For more information, please contact
Planned Giving at 800.343.3144 or by e-mail at
PlannedGiving@TEAM.org.*