

November 13, 2023

To: Congregations, Seminaries, Auxiliaries, Listed Service Organizations, and interested others.

RE: 2023 Third Quarter Gift Report

The attached report summarizes the results of the Gift Planning activity carried out by Lutheran Foundation Canada throughout the third quarter of 2023.

The first page provides a summary of both received and future planned gifts, indicating the total amount allocated to each beneficiary organization, as designated by the donors themselves. Praise be to God!

The detailed "Notes" on the Monthly Detail Report which follows, shows the vast range of gifts, not only by size, but by type, and how they are to be disbursed. Please note that Direct and Bequest gifts are current gifts which have already been received and disbursed, whereas Established or Identified gifts are future planned gifts, yet to be received from the donor's estate at the time of their passing. Current and future mission and ministry is supported and blessed by every one of these gifts.

Following the Monthly Detail Report is a summary of the specific congregations designated by this year's donors to receive a gift either as a current gift or as a planned future gift. These gifts to congregations are incredibly important as they support and enhance the long-term viability of the congregation.

Lastly, is a summary of the gift allocations planned or received over the last fourteen (14) years, totalling just under \$82 million. These allocations have been stipulated by the donors, either within their will or within a *Gift Allocation Agreement* they signed with Lutheran Foundation Canada.

Gift Coordinators work on behalf of all LCC organizations, promoting, encouraging, assisting, stewarding, and managing the development of planned (estate) gifts or significant lifetime gifts as part of a Christian's overall stewardship plan. Donors are excited about their opportunity to create a charitable gift within their estate supporting a ministry for which they have a passion, and the Foundation is blessed to be able to assist them in its development and fulfilment.

For more information on establishing a gift, visit the Foundation's web site at [www.lutheranfoundation.ca](http://www.lutheranfoundation.ca), or contact your regional representative. If you have any questions regarding this report, please do not hesitate to contact me.

In His Service,



Allen Schellenberg  
Executive Director – Lutheran  
Foundation Canada  
Gift Coordinator – Western Region  
Lutheran Foundation Canada  
1-877-711-4438 (GIFT)

3074 Portage Avenue  
Winnipeg, MB R3K 0Y2

1-877-711-4438  
Fax 204-897-4319  
[www.lutheranfoundation.ca](http://www.lutheranfoundation.ca)





## Gift Allocation Summary – YTD Q3 2023

Total gifts, either already received or planned as future gifts, are based on the donors' requested disbursements, as indicated within the NOTES on the Monthly Detail Reports which follow.

Organization	Donor-Designated Allocations	Percentage of Distribution
Congregations - West Region	\$92,075	2.5%
Congregations - Central Region	\$96,700	2.6%
Congregations - East Region	\$717,700	19.5%
Lutheran Church - Canada	\$1,087,925	29.5%
Concordia Lutheran Seminary	\$217,200	5.9%
Concordia Lutheran Theological Seminary	\$2,900	0.1%
Lutheran Laymen's League of Canada	\$92,150	2.5%
Lutheran Women's Missionary League	\$0	0.0%
Concordia Lutheran Mission Society	\$266,800	7.2%
LCC's Mission and Service Organizations	\$30,600	0.8%
Canadian Lutheran World Relief	\$123,400	3.3%
Lutheran Foundation Canada	\$699,400	19.0%
Unspecified *	\$257,170	7.0%
<b>Total YTD Donor-Designated Allocations</b>	<b>\$3,684,020</b>	<b>100.0%</b>

\* Unspecified gifts occur when the donors place their gift into a “donor-advised fund”, naming the beneficiary at a later date, or if they choose to not share this information with us.

In total this year, **\$512,520** has already been received and disbursed.



# Gift Allocation - Monthly Detail

## January

Organization	Allocation Amount	Notes
Congregations - West Region		
Congregations - Central Region	\$16,650	6, 7
Congregations - East Region	\$15,300	10
Lutheran Church - Canada	\$45,200	8
Concordia Lutheran Seminary		
Concordia Lutheran Theological Seminary	\$2,900	9
Lutheran Laymen's League of Canada		
Lutheran Women's Missionary League		
Concordia Lutheran Mission Society		
LCC's Mission and Service Organizations	\$2,900	9
Canadian Lutheran World Relief		
Lutheran Foundation Canada	\$32,550	1-5
Unspecified		
<b>Total Gifts – this Month</b>	<b>\$115,500</b>	<b>10</b>
<b>Total Gifts – Year to Date</b>	<b>\$115,500</b>	<b>10</b>

NOTES:

1. – 5. A total of 7 direct gifts received totaling \$32,550 to cover premiums on previously gifted insurance policies, now owned by LCCFM, but designated for various organizations through a *Gift Allocation Agreement*, to be disbursed once the payout has been received.
6. A direct gift of shares received of \$4,450 for a Central Region congregation.
7. A direct gift of shares received of \$12,200 for a Central Region congregation.
8. A direct gift of shares of \$45,200 for LCC's Mission and Ministry Endowment Fund.
9. A direct gift received of \$5,800, shared equally between CLTS and Lutheran Bible Translators
10. A direct gift of shares received of \$15,300 for an East Region congregation.



# Gift Allocation - Monthly Detail

## February

Organization	Allocation Amount	Notes
Congregations - West Region	\$3,000	5
Congregations - Central Region	\$100	4
Congregations - East Region	\$11,000	1
Lutheran Church - Canada	\$52,150	1, 2, 3, 4
Concordia Lutheran Seminary	\$1,000	4
Concordia Lutheran Theological Seminary		
Lutheran Laymen's League of Canada	\$1,000	4
Lutheran Women's Missionary League		
Concordia Lutheran Mission Society		
LCC's Mission and Service Organizations	\$26,000	1, 4
Canadian Lutheran World Relief	\$4,900	3, 4, 5
Lutheran Foundation Canada	\$56,000	1
Unspecified		
<b>Total Gifts – this Month</b>	<b>\$155,150</b>	<b>5</b>
<b>Total Gifts – Year to Date</b>	<b>\$270,650</b>	<b>15</b>

### NOTES:

- A deferred gift established of \$110,000 to be divided as follows:
  - \$55,000 to LCCFM
  - \$22,000 to Lutheran Church - Canada
  - \$11,000 to an East Region congregation
  - \$11,000 to Lutheran Bible Translators
  - \$11,000 to BC Mission Boat
- A direct gift of shares received of \$28,600 for LCC's Mission and Ministry Endowment Fund.
- A direct gift of shares received of \$1,475 with \$900 to Canadian Lutheran World Relief and \$550 Lutheran Church - Canada.
- A direct gift of shares received of \$9,100 divided as follows:
  - \$1,000 to Concordia Lutheran Seminary
  - \$1,000 to Luth. Assoc. Missionaries and Pilots
  - \$1,000 to Lutheran Laymen's League
  - \$1,000 to Lutheran Bible Translators
  - \$100 to a Central Region congregation
  - \$1,000 to Lutheran Church - Canada
  - \$1,000 to Haiti Luth. Mission Soc.
  - \$1,000 Canadian Lutheran World Relief
  - \$1,000 to LCCFM
  - \$1,000 to Can. Lutherland of Qu'appelle Lakes
- A direct gift received of \$6,000 divided equally between Canadian Lutheran World Relief and a West Region congregation



# Gift Allocation - Monthly Detail

## March

Organization	Allocation Amount	Notes
Congregations - West Region	\$10,925	3, 4
Congregations - Central Region		
Congregations - East Region	\$1,800	2
Lutheran Church - Canada	\$50,000	1
Concordia Lutheran Seminary	\$1,900	5
Concordia Lutheran Theological Seminary		
Lutheran Laymen's League of Canada	\$150	3
Lutheran Women's Missionary League		
Concordia Lutheran Mission Society	\$600	3
LCC's Mission and Service Organizations	\$700	3
Canadian Lutheran World Relief		
Lutheran Foundation Canada	\$24,850	3, 6
Unspecified		
<b>Total Gifts – this Month</b>	<b>\$90,925</b>	<b>6</b>
<b>Total Gifts – Year to Date</b>	<b>\$361,575</b>	<b>21</b>

### NOTES:

1. A direct gift received of \$50,000 for LCC Missions in Nicaragua.
2. A direct of shares received of \$1,800 for an East Region congregation.
3. A direct gift of shares received of \$9,600 disbursed as follows:
  - \$7,800 to a West Region congregation
  - \$600 to Concordia Lutheran Mission Society
  - \$300 to Haiti Lutheran Mission Society
  - \$150 to Lutheran Association of Missionaries and Pilots
  - \$250 to Lutheran Bible Translators
  - \$150 to Lutheran Layman's League
  - \$350 to LCCFM
4. A direct gift of shares received of \$3,125 for a West Region congregation
5. A direct gift received of \$1,900 for Concordia Lutheran Seminary
6. A direct gift received of \$24,500 from an insurance policy to LCCFM.



# Gift Allocation - Monthly Detail

## April

Organization	Allocation Amount	Notes
Congregations - West Region		
Congregations - Central Region		
Congregations - East Region	\$402,000	1,2,3
Lutheran Church - Canada	\$273,500	2,4
Concordia Lutheran Seminary		
Concordia Lutheran Theological		
Lutheran Laymen's League of Canada		
Lutheran Women's Missionary League		
Concordia Lutheran Mission Society	\$266,200	1,2
LCC's Mission and Service Organizations		
Canadian Lutheran World Relief		
Lutheran Foundation Canada	\$253,500	2
Unspecified		
<b>Total Gifts – this Month</b>	<b>\$1,195,200</b>	<b>4</b>
<b>Total Gifts – Year to Date</b>	<b>\$1,556,775</b>	<b>25</b>

### NOTES:

- A direct gift of shares received of \$29,300 divided as follows:
  - \$16,500 to a East Region cong.
  - \$12,700 to Concordia Lutheran Mission Society
- A deferred gift established of \$1,014,000 divided as follows:
  - \$253,500 to LCC for missions in Nicaragua
  - \$253,500 to Concordia Lutheran Mission Society
  - \$253,500 to an East Region congregation
  - \$253,500 to Lutheran Foundation Canada
- A deferred gift established of \$132,050 for an East Region congregation.
- A deferred gift established of \$20,000 for LCC's Mission and Ministry Endowment Fund.



# Gift Allocation - Monthly Detail

## May

Organization	Allocation Amount	Notes
Congregations - West Region	\$50,000	5
Congregations - Central Region	\$2,000	1
Congregations - East Region		
Lutheran Church - Canada	\$50,000	3
Concordia Lutheran Seminary	\$54,000	2,4
Concordia Lutheran Theological		
Lutheran Laymen's League of Canada		
Lutheran Women's Missionary League		
Concordia Lutheran Mission Society		
LCC's Mission and Service Organizations		
Canadian Lutheran World Relief		
Lutheran Foundation Canada		
Unspecified		
Total Gifts – this Month	\$156,000	5
Total Gifts – Year to Date	\$1,712,775	30

### NOTES:

1. A direct gift received of \$2,000 to a Central Region congregation.
2. A deferred gift identified of \$50,000 to Concordia Lutheran Seminary.
3. A deferred gift identified of \$50,000 to Lutheran Church - Canada.
4. A direct gift of shares received of \$4,000 to Concordia Lutheran Seminary.
5. A deferred gift identified of \$50,000 to a West Region congregation.



# Gift Allocation - Monthly Detail

## June

Organization	Allocation Amount	Notes
Congregations - West Region		
Congregations - Central Region	\$50,000	4
Congregations - East Region	\$232,500	1
Lutheran Church - Canada	\$352,000	1,5,6
Concordia Lutheran Seminary	\$85,300	3,6
Concordia Lutheran Theological		
Lutheran Laymen's League of Canada		
Lutheran Women's Missionary League	\$66,000	6
Concordia Lutheran Mission Society		
LCC's Mission and Service Organizations		
Canadian Lutheran World Relief	\$5,275	2
Lutheran Foundation Canada	\$232,500	1
Unspecified		
<b>Total Gifts – this Month</b>	<b>\$1,023,575</b>	<b>6</b>
<b>Total Gifts – Year to Date</b>	<b>\$2,736,350</b>	<b>36</b>

### NOTES:

- A deferred gift established of \$697,500 to be evenly divided as follows:
  - \$232,500 to Lutheran Church - Canada
  - \$232,500 to Lutheran Foundation Canada
  - \$232,500 to an East Region congregation
- A direct gift received of \$5,275 for Canadian Lutheran World Relief.
- An bequest gift received of \$8,800 for Concordia Lutheran Seminary via LCCFM endowment LC0016.
- A deferred gift identified of \$50,000 for a Central Region congregation.
- A direct gift of shares received of \$50,000 for Lutheran Church - Canada.
- A deferred gift established of \$198,000 split evenly as follows:
  - \$66,000 to Lutheran Church - Canada
  - \$66,000 to Lutheran Women's Missionary League of Canada
  - \$66,000 to Concordia Lutheran Seminary



## Gift Allocation - Monthly Detail

### July

Organization	Allocation Amount	Notes
Congregations - West Region		
Congregations - Central Region	\$850	1
Congregations - East Region	\$20,100	4
Lutheran Church - Canada	\$205,075	3,5
Concordia Lutheran Seminary		
Concordia Lutheran Theological Seminary		
Lutheran Laymen's League of Canada		
Lutheran Women's Missionary League		
Concordia Lutheran Mission Society		
LCC's Mission and Service Organizations		
Canadian Lutheran World Relief	\$5,075	5
Lutheran Foundation Canada		
Unspecified	\$7,770	2
Total Gifts – this Month	\$238,870	5
Total Gifts – Year to Date	\$2,975,220	41

#### Notes:

1. A direct gift received of \$850 for a Central Region congregation.
2. A direct gift received of \$7,770 for organizations yet to be determined.
3. A deferred gift identified of \$200,000 for Lutheran Church – Canada.
4. A direct gift of shares received of \$20,100 for an East Region congregation.
5. A direct gift of shares received of \$10,150, divided as follows:
  - \$5,075 for Lutheran Church – Canada
  - \$5,075 for Canadian Lutheran World Relief.



# Gift Allocation - Monthly Detail

## August

Organization	Allocation Amount	Notes
Congregations - West Region		
Congregations - Central Region	\$27,100	4
Congregations - East Region	\$35,000	2
Lutheran Church - Canada		
Concordia Lutheran Seminary		
Concordia Lutheran Theological		
Lutheran Laymen's League of Canada		
Lutheran Women's Missionary League		
Concordia Lutheran Mission Society		
LCC's Mission and Service Organizations	\$1,000	3
Canadian Lutheran World Relief		
Lutheran Foundation Canada	\$100,000	5
Unspecified	\$24,400	1
<b>Total Gifts – this Month</b>	<b>\$187,500</b>	<b>5</b>
<b>Total Gifts – Year to Date</b>	<b>\$3,162,720</b>	<b>46</b>

### NOTES:

1. A direct gift of shares received of \$24,400 with beneficiaries yet to be determined.
2. A deferred gift identified of \$35,000 for an East Region congregation.
3. A direct gift received of \$1,000 for Wagner Hills Farm, an LSO of LCC.
4. A bequest gift received of \$27,100 for a Central Region congregation.
5. A deferred gift identified of \$100,000 for LCCFM.



# Gift Allocation - Monthly Detail

## September

Organization	Allocation Amount	Notes
Congregations - West Region	\$28,150	2,3
Congregations - Central Region		
Congregations - East Region		
Lutheran Church - Canada	\$60,000	5
Concordia Lutheran Seminary	\$75,000	1,3
Concordia Lutheran Theological		
Lutheran Laymen's League of Canada	\$25,000	3
Lutheran Women's Missionary League		
Concordia Lutheran Mission Society		
LCC's Mission and Service Organizations		
Canadian Lutheran World Relief	\$28,150	2,3,7
Lutheran Foundation Canada		
Unspecified	\$225,000	4,6
<b>Total Gifts – this Month</b>	<b>\$521,300</b>	<b>7</b>
<b>Total Gifts – Year to Date</b>	<b>\$3,684,020</b>	<b>53</b>

### NOTES:

1. A deferred gift identified of \$50,000 for student aid at Concordia Lutheran Seminary.
2. A direct gift of shares received of \$6,300 divided as follows:
  - \$3,150 for a West Region congregation
  - \$5,150 for Canadian Lutheran World Relief.
3. A bequest gift received of \$100,000 divided as follows:
  - \$25,000 for a West Region congregation
  - \$25,000 for Lutheran Laymen’s League of Canada
  - \$25,000 for Concordia Lutheran Seminary
  - \$25,000 for Canadian Lutheran World Relief.
4. A deferred gift established of \$200,000 to unspecified LCC organizations.
5. A deferred gift established of \$60,000 to LCC missions.
6. A deferred gift established of \$25,000 to unspecified LCC organizations.
7. A deferred gift identified of \$80,000 to Canadian Lutheran World Relief.

# Gift Allocation - Monthly Detail



Lutheran Foundation Canada  
REFLECTING GOD'S GRACE

## Congregations Designated in 2023 to Receive Current or Future Gifts

**Beautiful Saviour, Winnipeg, MB**  
**Calvary – Thunder Bay, ON**  
**Christ the King – 100 Mile House, BC**  
**Faith – Kitchener, ON**  
**Faith – London, ON**  
**Faith – Surrey, BC**  
**First – Kelowna, BC**  
**First – Windsor, ON**  
**Good Shepherd – Regina, SK**  
**Grace – Saskatoon, SK**  
**Messiah, Waterloo, ON**  
**St. Jame's – Winnipeg, MB**  
**St. John's – Pembroke, ON**  
**St. Peter's – Stratford, ON**  
**Trinity – Niagara-on-the-Lake, ON**  
**Trinity – Richmond, BC**

**Lutheran Foundation Canada - 14-Year Gift Summary**  
(2009- 2022)



The following table shows how the membership of Lutheran Church - Canada has responded to giving opportunities, either in their estate or as a current gift. (Allocations are based upon the expressed wishes of the donors.) May God be praised!  
(Due to restructuring, previous District amounts have now been added to the Region/Congregation amounts.)

Beneficiary	2009 Gift Total	2010 Gift Total	2011 Gift Total	2012 Gift Total	2013 Gift Total	2014 Gift Total	2015 Gift Total	2016 Gift Total	2017 Gift Total	2018 Gift Total	2019 Gift Total	2020 Gift Total	2021 Gift Total	2022 Gift Total	14 Year Gift Total	% of Total Gifts
West Region/Cong.	\$457,270	\$1,356,010	\$654,849	\$729,867	\$4,437,200	\$666,475	\$281,440	\$368,625	\$643,285	\$342,800	\$363,215	\$321,440	\$155,610	\$240,225	\$11,018,311	13.47%
Central Region/Cong.	\$70,000	\$141,310	\$213,500	\$190,800	\$852,200	\$646,550	\$229,550	\$1,069,010	\$166,225	\$728,154	\$923,345	\$1,215,280	\$910,680	\$21,265	\$7,377,869	9.02%
East Region/Cong.	\$551,000	\$1,220,926	\$946,527	\$957,475	\$1,237,360	\$1,711,325	\$893,780	\$1,304,690	\$1,090,800	\$428,925	\$100,220	\$1,482,765	\$181,080	\$203,830	\$12,310,703	15.05%
LCC	\$392,100	\$670,000	\$274,100	\$299,125	\$1,188,855	\$137,500	\$431,420	\$140,434	\$151,380	\$1,455,183	\$405,175	\$95,155	\$2,184,055	\$1,008,510	\$8,832,992	10.80%
CLS	\$167,500	\$1,282,025	\$396,106	\$335,766	\$2,186,500	\$666,242	\$511,850	\$1,514,025	\$353,950	\$1,821,833	\$572,525	\$1,048,450	\$289,385	\$45,000	\$11,191,157	13.68%
CLTS	\$85,600	\$247,710	\$307,888	\$295,425	\$239,055	\$309,408	\$763,300	\$441,730	\$104,200	\$100,740	\$0	\$24,000	\$654,150	\$2,200	\$3,575,406	4.37%
LLL-C	\$38,200	\$778,600	\$273,400	\$445,600	\$814,255	\$393,000	\$498,300	\$303,900	\$308,000	\$452,465	\$298,300	\$281,750	\$30,230	\$6,725	\$4,922,725	6.02%
LWML-C	\$20,000	\$204,360	\$0	\$150,750	\$182,000	\$205,125	\$15,000	\$5,050	\$61,600	\$85,000	\$3,750	\$4,000	\$0	\$37,500	\$974,135	1.19%
CLMS	\$40,000	\$86,333	\$333,384	\$98,750	\$259,000	\$331,450	\$262,870	\$273,000	\$476,925	\$85,200	\$59,590	\$1,152,165	\$163,200	\$72,180	\$3,694,047	4.52%
LSO's	\$160,575	\$248,920	\$174,500	\$95,125	\$433,420	\$608,725	\$596,450	\$110,780	\$81,950	\$814,560	\$219,440	\$485,200	\$132,590	\$66,700	\$4,228,935	5.17%
CLWR	\$20,000	\$1,122,196	\$49,605	\$238,917	\$244,055	\$403,000	\$407,700	\$60,000	\$712,375	\$789,000	\$194,685	\$26,850	\$114,200	\$23,120	\$4,405,703	5.39%
LCCFM	\$280,000	\$200,000	\$147,897	\$218,050	\$118,150	\$480,050	\$2,286,326	\$177,300	\$486,260	\$303,640	\$80,230	\$224,785	\$138,735	\$104,330	\$5,245,753	6.41%
Unspecified	\$20,000	\$0	\$165,000	\$50,000	\$55,000	\$380,000	\$50,000	\$737,300	\$50,000	\$100,000	\$2,091,770	\$51,015	\$119,810	\$132,920	\$4,002,815	4.89%
<b>Total Gifts</b>	<b>\$2,302,245</b>	<b>\$7,558,390</b>	<b>\$3,936,756</b>	<b>\$4,105,650</b>	<b>\$12,247,050</b>	<b>\$6,938,850</b>	<b>\$7,227,986</b>	<b>\$6,505,844</b>	<b>\$4,686,950</b>	<b>\$7,507,500</b>	<b>\$5,312,245</b>	<b>\$6,412,855</b>	<b>\$5,073,725</b>	<b>\$1,964,505</b>	<b>\$81,780,551</b>	<b>100.00%</b>
<b>Total Cash Rec'd</b>	<b>\$115,750</b>	<b>\$537,165</b>	<b>\$545,800</b>	<b>\$641,400</b>	<b>\$693,050</b>	<b>\$2,147,850</b>	<b>\$1,512,986</b>	<b>\$2,137,164</b>	<b>\$1,716,250</b>	<b>\$934,500</b>	<b>\$1,522,245</b>	<b>\$1,064,855</b>	<b>\$2,197,325</b>	<b>\$1,087,005</b>	<b>\$16,853,345</b>	<b>20.61%</b>

Please contact Allen Schellenberg at 877-711-4438 if you have any questions.