

Estate Planning Workbook



THE FOUNDATION
OF ST. ANDREW'S

*A ministry to the heartfelt legacies of donors, and
a service to the internal and extended ministries of
St. Andrew's Lutheran Church*

The Foundation of St. Andrew's Lutheran Church is a nonprofit organization and a separate 501(c)(3) from St. Andrew's Lutheran Church. The Foundation is classified by the IRS as a **public** charity (Tax ID# 41-2001359). It was established in 2000 to provide funds for religious and charitable needs outside the scope of the annual budget of the congregation.



Dear Friends in Christ,

The Foundation of St. Andrew's Lutheran Church has assembled this workbook in faithful response to its mission to Serve, Inform and Connect.

This workbook is just a first step, intended to encourage and assist you in the important work of creating a will or trust. By completing this workbook, you will be better prepared to meet with a qualified estate planning/legal professional.

The Foundation is here to help you and to work with you to find the best pathways to realize the blessings you hope to see flow from your life, whether within St. Andrew's or far beyond.

For more information or to discuss including The Foundation of St. Andrew's Lutheran Church in your estate plans, please contact me.



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MISSION STATEMENT

God calls The Foundation to support St. Andrew's missional efforts:

SERVE in Christ's name through careful stewardship of donor assets

INFORM about generosity as an extension of faith and witness to God's mission

CONNECT donors with resources to translate their heartfelt intentions into charitable legacies

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The Foundation of St. Andrew’s Lutheran Church is a 501(c)(3) nonprofit organization and operates separately from, though cooperatively with St. Andrew’s Lutheran Church. The Foundation is classified by the IRS as a public charity (Tax ID# 41-2001369).

BASIC ESTATE PLANNING DOCUMENTS

Will

Your will is a written document, signed by you and by two or more witnesses or a notary, depending on the state where you reside. A will goes into effect at your death and will be reviewed and authenticated by the probate court to determine the distribution of your property. If the will is not valid or you do not have a will, the court will follow state law to distribute your assets and appoint guardians for minor children. Be aware that the court's decisions may not be consistent with your desires. With a valid will, you can choose who will inherit your property and who will administer your estate as executor or personal representative. If you have minor children, you can choose a person to raise your children. A valid will is an essential part of transferring your property at the right time to the right people at the lowest cost. Without a valid will your family may encounter increased costs, delays, and unnecessary conflicts. You can provide a wonderful legacy for your family with an updated will and a sound estate plan.

Note: a will and a trust are not the same though several components of a will can be included in a trust. Trusts provide for the management and distribution of your assets during lifetime and after death. Your estate planning professional will help you decide how best to meet your expectations.

Durable Power of Attorney for Finances

A durable power of attorney for finances gives someone the authority to manage your financial affairs if you become unable to do so yourself. Poor health or even a lack of mobility can be a time when you will not want to worry about your property being neglected or bills going unpaid. A durable power of attorney for finances helps protect your property and yourself. With a durable power of attorney, you select someone to act as your agent, also known as your attorney-in-fact. This person will have the legal right to manage your property. If you become incapacitated and do not have a durable power of attorney for finances, the court may decide to appoint a conservator to manage your affairs, and that can come with expensive reports, audits, and costs to manage your property.



Health Care Directives

Health care directives may include three components: a living will; a durable power of attorney for health care; an authorization to release protected health information.

A **living will** provides instructions for your care at the end of your life or when you are unable to decide yourself. The instructions may address nutrition, hydration, pain management, and resuscitation. A living will gives you the opportunity to make your preferences known about the types of care you would like to be provided or avoided.

The **durable power of attorney for health care** allows you to select a person to make medical decisions on your behalf if you are incapable of making those decisions yourself.

An **authorization for release of protected health information** allows you to appoint individuals to obtain protected medical information. Congress passed the Health Insurance Portability and Accountability Act of 1996 (HIPAA) to govern the privacy of your medical information. Family members and others are denied access to your medical records unless you have provided prior written consent granting access to your records. A HIPAA authorization in your health care directive satisfies the prior written consent requirement under the law and allows your health care agents to access your medical records and to get health information from your doctor.



The Right Estate Plan for You

These are the basics. Several other estate planning options and strategies are available, including Revocable Living Trusts, Life Insurance, Charitable Remainder Trusts, Charitable Gift Annuities, Donor Advised Funds, Charitable Endowments, and much more. See a brief description of each of these options in the section titled **A Deeper Dive**. This, however, is when your estate planning professional is essential. If you do not already work with an estate planning professional, we can provide a list of referrals for you to consider.

GENERAL ESTATE PLANNING OBJECTIVES

You will have a number of goals that can be carried out through your estate plan. Listed below are several potential goals. You may also want to note other goals that should be shared with your estate planning professional.

You might find it valuable to clarify the importance of your goals by writing a number from one to five by each goal. (One is a lower priority and five is the highest priority.)

- | | |
|--------------------------|--|
| <input type="checkbox"/> | Maintain or increase current level of income in retirement |
| <input type="checkbox"/> | Reduce liabilities for my surviving spouse and/or family members |
| <input type="checkbox"/> | Provide ongoing income for my surviving spouse and/or another person |
| <input type="checkbox"/> | Provide for guardianship of minor children |
| <input type="checkbox"/> | Provide for long-term health care for myself, spouse, and others, if needed |
| <input type="checkbox"/> | Leave an impact on the charities I hold dear |
| <input type="checkbox"/> | Manage the transfer of assets in the most cost-efficient and tax-advantaged manner |

Other Goals: _____

YOU AND THOSE YOU HOLD DEAR

What will be your legacy? Think about the people, ministries, causes, and organizations that you hold dear. As you complete this section, note any special interests for children or grandchildren (i.e., college education, first house payment, special needs, etc.) *NOTE: Add additional sheets as necessary.*

YOU

YOUR FULL NAME:

HOME ADDRESS:

CITY: STATE: ZIP:

BIRTHDATE: PLACE OF BIRTH: SSN:

PHONE: EMAIL:

MARITAL STATUS: PREVIOUSLY MARRIED?

YOUR SPOUSE/SIGNIFICANT OTHER

FULL NAME:

HOME ADDRESS:

CITY: STATE: ZIP:

BIRTHDATE: PLACE OF BIRTH: SSN:

PHONE: EMAIL:

MARITAL STATUS: PREVIOUSLY MARRIED?

YOUR CHILDREN

NAME:

HOME ADDRESS:

CITY: STATE: ZIP:

BIRTHDATE: PLACE OF BIRTH: SSN:

PHONE: EMAIL:

RELATIONSHIP:

DEPENDENT? NEEDS SPECIAL CARE? EXCLUDE FROM ESTATE PLAN?

SPECIAL CONSIDERATIONS:

NAME:

HOME ADDRESS:

CITY: STATE: ZIP:

BIRTHDATE: PLACE OF BIRTH: SSN:

PHONE: EMAIL:

RELATIONSHIP:

DEPENDENT? NEEDS SPECIAL CARE? EXCLUDE FROM ESTATE PLAN?

SPECIAL CONSIDERATIONS:

OTHER FAMILY OR FRIENDS (if any are to be included in estate plans)

NAME:

HOME ADDRESS:

CITY: STATE: ZIP:

BIRTHDATE: PLACE OF BIRTH: SSN:

PHONE: EMAIL:

RELATIONSHIP:

SPECIAL CONSIDERATIONS:

NAME:

HOME ADDRESS:

CITY: STATE: ZIP:

BIRTHDATE: PLACE OF BIRTH: SSN:

PHONE: EMAIL:

RELATIONSHIP:

SPECIAL CONSIDERATIONS:

ORGANIZATIONS/CHARITIES YOU HOLD DEAR

NAME:

ADDRESS:

CITY: STATE: ZIP:

PHONE: EMAIL:

SPECIAL CONSIDERATIONS:

NAME:

ADDRESS:

CITY: STATE: ZIP:

PHONE: EMAIL:

SPECIAL CONSIDERATIONS:

NAME:

ADDRESS:

CITY: STATE: ZIP:

PHONE: EMAIL:

SPECIAL CONSIDERATIONS:

KEY PARTNERS

It is important to plan ahead and appoint individuals who will assist you in carrying out your estate plan. You should also consider alternates in the event the people you have chosen are unable or unwilling to accept the responsibility. An executor, or personal representative, is the individual or institution (a bank trust department, for example) you name in your will to carry out the probate process on your behalf. Executors/personal representatives work with the probate court to follow the terms of your will and distribute your assets. If you have minor children or care for an adult who is incapacitated, you should additionally name a guardian for them in your will. If you are using a trust in your estate plan, you should also appoint a trustee. The trustee is the legal owner and manager of the assets in your trust. Trustees are charged with distributing trust assets according to the instructions in your trust. Be sure to have a conversation with your legal advisor about wills and trusts to understand which will be most appropriate for your situation.

EXECUTOR/TRUSTEE(S)

EXECUTOR/TRUSTEE:

ADDRESS:

CITY: STATE: ZIP:

PHONE: EMAIL:

RELATIONSHIP:

CO-EXECUTOR/TRUSTEE:

ADDRESS:

CITY: STATE: ZIP:

PHONE: EMAIL:

RELATIONSHIP:

GUARDIAN FOR MINOR CHILDREN (OR OTHER DEPENDENTS)

GUARDIAN:

ADDRESS:

CITY: STATE: ZIP:

PHONE: EMAIL:

RELATIONSHIP:

ALTERNATE GUARDIAN:

ADDRESS:

CITY: STATE: ZIP:

PHONE: EMAIL:

RELATIONSHIP:

POWER OF ATTORNEY FOR FINANCES (IF DESIRED)

POWER OF ATTORNEY NAME:

ADDRESS:

CITY:

STATE:

ZIP:

PHONE:

EMAIL:

RELATIONSHIP:

ALTERNATE POWER OF ATTORNEY NAME:

ADDRESS:

CITY:

STATE:

ZIP:

PHONE:

EMAIL:

RELATIONSHIP:

HEALTH CARE DIRECTIVE AGENT (IF DESIRED)

HEALTH CARE AGENT NAME:

ADDRESS:

CITY:

STATE:

ZIP:

PHONE:

EMAIL:

RELATIONSHIP:

HEALTH CARE AGENT NAME:

ADDRESS:

CITY:

STATE:

ZIP:

PHONE:

EMAIL:

RELATIONSHIP:



ESTATE INVENTORY

Add additional sheets as necessary for each of the following categories.

FINANCIAL ASSETS

- *Checking and Savings Accounts*
- *Certificates of Deposit*
- *Savings Bonds*
- *Money Market and Investment Funds*
- *Stocks*
- *Bonds*
- *Mutual Funds*
- *Life Insurance*
- *Retirement Accounts*
- *Annuities*

BANK/COMPANY NAME:

ADDRESS:

CITY: STATE: ZIP:

PHONE: WEBSITE:

TYPE OF ACCOUNT/CONTRACT:

ACCOUNT/POLICY NUMBER: ESTIMATED VALUE:

BENEFICIARIES (If currently designated)

HOW OWNED: SINGLE JOINT JOINT WITH RIGHT OF SURVIVORSHIP OTHER:

BANK/COMPANY NAME:

ADDRESS:

CITY: STATE: ZIP:

PHONE: WEBSITE:

TYPE OF ACCOUNT/CONTRACT:

ACCOUNT/POLICY NUMBER: ESTIMATED VALUE:

BENEFICIARIES (If currently designated)

HOW OWNED: SINGLE JOINT JOINT WITH RIGHT OF SURVIVORSHIP OTHER:

BANK/COMPANY NAME:

ADDRESS:

CITY: STATE: ZIP:

PHONE: WEBSITE:

TYPE OF ACCOUNT/CONTRACT:

ACCOUNT/POLICY NUMBER: ESTIMATED VALUE:

BENEFICIARIES (If currently designated)

HOW OWNED: SINGLE JOINT JOINT WITH RIGHT OF SURVIVORSHIP OTHER:

BANK/COMPANY NAME:

ADDRESS:

CITY:

STATE:

ZIP:

PHONE:

WEBSITE:

TYPE OF ACCOUNT/CONTRACT:

ACCOUNT/POLICY NUMBER:

ESTIMATED VALUE:

BENEFICIARIES (If currently designated)

HOW OWNED: SINGLE JOINT JOINT WITH RIGHT OF SURVIVORSHIP OTHER:

BANK/COMPANY NAME:

ADDRESS:

CITY:

STATE:

ZIP:

PHONE:

WEBSITE:

TYPE OF ACCOUNT/CONTRACT:

ACCOUNT/POLICY NUMBER:

ESTIMATED VALUE:

BENEFICIARIES (If currently designated)

HOW OWNED: SINGLE JOINT JOINT WITH RIGHT OF SURVIVORSHIP OTHER:

REAL ESTATE

DESCRIPTION:

ADDRESS:

CITY:

STATE:

ZIP:

ESTIMATED VALUE:

HOW OWNED: SINGLE JOINT JOINT WITH RIGHT OF SURVIVORSHIP OTHER:

DESCRIPTION:

ADDRESS:

CITY:

STATE:

ZIP:

ESTIMATED VALUE:

HOW OWNED: SINGLE JOINT JOINT WITH RIGHT OF SURVIVORSHIP OTHER:

DESCRIPTION:

ADDRESS:

CITY:

STATE:

ZIP:

ESTIMATED VALUE:

HOW OWNED: SINGLE JOINT JOINT WITH RIGHT OF SURVIVORSHIP OTHER:

BUSINESS INTEREST(S)

| | | |
|--|--------|------|
| NAME/DESCRIPTION: | | |
| ADDRESS: | | |
| CITY: | STATE: | ZIP: |
| ESTIMATED VALUE: | | |
| HOW OWNED: <input type="checkbox"/> SOLE PROPRIETORSHIP <input type="checkbox"/> PARTNERSHIP <input type="checkbox"/> CORPORATION <input type="checkbox"/> LLC <input type="checkbox"/> OTHER: | | |
| PRIMARY CONTACT BESIDES YOU: | | |

OTHER TANGIBLE ASSETS AND PERSONAL PROPERTY

Note significant personal property such as vehicles, jewelry, heirlooms, and the like. (It is not necessary to describe every item of your personal or real property in your will. It is only important to note specific items or property you want to go to certain individuals or charities.)

| | |
|----------------------------------|------------------|
| FURNITURE/HOUSEHOLD FURNISHINGS: | ESTIMATED VALUE: |
| TOOLS AND EQUIPMENT: | ESTIMATED VALUE: |
| ANTIQUES/COLLECTIONS: | ESTIMATED VALUE: |
| JEWELRY: | ESTIMATED VALUE: |
| AUTOMOBILES/BOATS/VEHICLES: | ESTIMATED VALUE: |
| DESCRIPTION: | ESTIMATED VALUE: |
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(Add another sheet if necessary)

LIABILITIES AND WHAT YOU OWE

Note your financial obligations including mortgages, secured loans such as automobile loans, credit cards, promissory notes, personal loans, loans on life insurance or retirement accounts, and the like.

CREDITOR:

ADDRESS:

CITY: STATE: ZIP:

PURPOSE OF LOAN: ESTIMATED DEBT:

HOW RESPONSIBLE: INDIVIDUAL CO-SIGNER/GUARANTOR OTHER:

CREDITOR:

ADDRESS:

CITY: STATE: ZIP:

PURPOSE OF LOAN: ESTIMATED DEBT:

HOW RESPONSIBLE: INDIVIDUAL CO-SIGNER/GUARANTOR OTHER:

CREDITOR:

ADDRESS:

CITY: STATE: ZIP:

PURPOSE OF LOAN: ESTIMATED DEBT:

HOW RESPONSIBLE: INDIVIDUAL CO-SIGNER/GUARANTOR OTHER:

CREDITOR:

ADDRESS:

CITY: STATE: ZIP:

PURPOSE OF LOAN: ESTIMATED DEBT:

HOW RESPONSIBLE: INDIVIDUAL CO-SIGNER/GUARANTOR OTHER:

CREDITOR:

ADDRESS:

CITY: STATE: ZIP:

PURPOSE OF LOAN: ESTIMATED DEBT:

HOW RESPONSIBLE: INDIVIDUAL CO-SIGNER/GUARANTOR OTHER:

(Add another sheet if necessary)

ESTATE DISTRIBUTION

What will be your legacy? Think about the people, ministries, causes, and organizations that you hold dear. Perhaps it is your closest family and friends, your local congregation, a church ministry, a favorite charity, or a combination of these. Distribution of your estate can be as simple as liquidating all your assets then dividing the funds among your beneficiaries, or as complex as specifying who or what organization should get what percent or specified amount, or some combination of the above.

- Name your beneficiaries, the people and/or organizations you wish to remember.
- State either a specific dollar amount or a percentage of your entire estate to be shared.
- You may also choose to name contingent beneficiaries of your estate or for certain bequests.
- It is not necessary to describe every item of your personal or real property in your will. If you have specific items or property you want to go to certain individuals or charities, it is best to clearly note that rather than selling items and distributing the proceeds.

Note: the following lists your intent about who is to receive what. Your estate planning professional will ensure the right document is used to outline the structure of the distribution such as when and how, or other stipulations.

| | |
|-----------------------|-----------------------|
| RECIPIENT: | |
| ITEM (IF APPLICABLE): | PERCENTAGE or AMOUNT: |
| RECIPIENT: | |
| ITEM (IF APPLICABLE): | PERCENTAGE or AMOUNT: |
| RECIPIENT: | |
| ITEM (IF APPLICABLE): | PERCENTAGE or AMOUNT: |
| RECIPIENT: | |
| ITEM (IF APPLICABLE): | PERCENTAGE or AMOUNT: |
| RECIPIENT: | |
| ITEM (IF APPLICABLE): | PERCENTAGE or AMOUNT: |
| RECIPIENT: | |
| ITEM (IF APPLICABLE): | PERCENTAGE or AMOUNT: |
| RECIPIENT: | |
| ITEM (IF APPLICABLE): | PERCENTAGE or AMOUNT: |
| RECIPIENT: | |
| ITEM (IF APPLICABLE): | PERCENTAGE or AMOUNT: |

(Add another sheet if necessary)

GIVING OPTIONS AND SAMPLE BEQUEST LANGUAGE

Through a will or trust, a donor can designate specific estate assets, or a specific dollar amount or a specific percentage of the estate to bequeath to a beneficiary. The bequest can be restricted or left open as to how the recipient may use their gift.

Following are some examples of basic bequest language to help you think through the options:

Unrestricted General Bequest:

- Specified Dollar Amount: I give, devise, and bequeath to [person or organization] the sum of [\$ dollars] for its *general purposes*.
- Specified Percentage: I give, devise, and bequeath to [person or organization] an amount equal to ["x" percent] of my "net estate," as finally determined for federal estate tax purposes, for its *general purposes*.

Note: "Net estate" is my gross estate as finally determined for federal estate tax purposes, reduced by my debts and deductible expenses of administering my estate, including non-probate assets.

Unrestricted Specific Bequest:

- I give, devise, and bequeath to [person or organization] my real property located at (address, city, state) for its *general purposes*.
- Unrestricted Residuary Bequest: I give, devise, and bequeath to [person or organization] the residue of my estate, after satisfaction of all specific bequests and the payment of all my proper debts, taxes, costs related to my last illness, funeral and interment, and the expenses of administering my probate and all non-probate assets passing by reason of my death, for its *general purposes*.

Restricted Bequest:

- Specified Dollar Amount: I give, devise, and bequeath to [person or organization] the sum of [\$ dollars] to be used for the *[name purpose]*.
- Specified Percentage: I give, devise, and bequeath to [name purpose] an amount equal to ["x" percent] of my net estate, as finally determined for federal estate purposes, *[name specific purpose of use of funds]*.

Disclosure: The preceding illustrations are not intended as legal advice. They are offered for demonstration purposes only. You are encouraged to consult with an estate planning professional and tax accountant before entering into any such agreement.

A DEEPER DIVE – STRATEGIC PLANNING OPTIONS

A variety of estate planning options and strategies can be tailored to individual needs.

Following is a high-level description of some of the more common options. This Estate Planning Workbook is offered to help you prepare for a more informed and meaningful discussion with your estate planning professional. If you do not already work with an estate planning professional, we can provide a list of referrals for you to consider.

Charitable Endowment

An endowment fund is an investment fund established by a foundation with the irrevocable contributions of donors. Endowments are made to non-profit organizations with the intention of investment to earn additional income for that organization, potentially into perpetuity. The donations from endowment funds are generally utilized for specific needs to further a charity's operating process. There are often caveats about how the charity can use the funds.

Charitable Remainder Trust

A charitable remainder trust is an irrevocable trust that combines tax savings to the donor with ongoing income. It first disperses income to the beneficiaries of the trust for a specified period of time and then donates the remainder of the trust to a designated charity or charities. The income recipient can be the donor or another family member or friend. This trust is commonly used for transferring highly appreciated assets during the donor's lifetime.

Donor Advised Funds

Also known as a DAF, a Donor Advised fund has the sole purpose of creating a legacy to support the charities you care about while generally providing a tax deduction at the time the account is funded. Your donation to a DAF is irrevocable, though your decisions about which charities to support remain flexible. A DAF also allows you to name advisors, such as children or family members, to make decisions about charitable bequests from the fund after your death. This is a great tool for transmitting charitable values to future generations.

Life Insurance

Life insurance is a contract that pays out a sum of money to a predetermined beneficiary or beneficiaries upon the policyholder's death. Life insurance proceeds are tax free to the beneficiary and can be an effective way to provide an inheritance.

Revocable Living Trust

A revocable living trust is a legal document through which your assets are placed into a trust for your benefit during your lifetime and then transferred to designated beneficiaries at your death by your chosen representative, called a "successor trustee." A revocable living trust is completely within your control during your lifetime. You can add or remove assets from the trust at any time. The three major benefits of creating a living trust are avoiding probate, saving money, and maintaining privacy for your estate.

...and so much more!

There are many more estate planning tools that can be employed to help you achieve your legacy intentions. The best resource for help with this is a qualified estate planning professional who fully understands the laws of the state where you live and the legal options available. If you do not already work with an estate planning professional, we can provide a list of referrals for you to consider.

**NOTES AND ITEMS TO DISCUSS WITH YOUR
ESTATE PLANNING PROFESSIONAL**



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