

Partners IN PLANNING

Fall 2022

Spiritual Before Mechanical

Bruce Owens Develops a Philosophy of Ministry

By Chelsea Rollman



hen Bruce Owens founded Mission to the World's Partner Relations Department in 1995, he immediately established a robust philosophy of ministry. The PCA had just appointed Paul Kooistra as MTW coordinator. Paul recruited Bruce to help build a new financial infrastructure that both men believed would further MTW's mobilization and church planting goals. Under Paul's leadership, Bruce centered the Partner Relations Department's flagship estate design service on one foundational principle: *Biblical stewardship is spiritual before it is mechanical.*

Bruce usually illustrates this concept using the outline of a trust. Every trust has five elements: a grantor (or owner), property, a trustee, a set of terms, and a contract. The terms of a trust are determined by the grantor and includes instruction for managing the trust during the life of the trust and a distribution clause for when the trust ends.

These five components actually describe a Christian's stewardship trust before God.

God is the owner of all.

"The earth is the Lord's, and everything in it, the world, and all who live in it ..." (Psalm 24:1 NIV)

He entrusts His people with His creation.

"Beware lest you say in your heart, 'My power and the might of my hand have gotten me this wealth.' You shall



remember the Lord your God, for it is he who gives you power to get wealth ..." (Deuteronomy 8:17-18)

People, as the trustees, faithfully steward the resources God grants to them.

"This is how one should regard us, as servants of Christ and stewards of the mysteries of God. Moreover, it is required of stewards that they be found faithful."

(1 Corinthians 4:1-2)

God determines the terms of the trust.

"If then you have not been faithful in the unrighteous wealth, who will entrust to you the true riches?"

(Luke 16:11)

God promises blessings for His faithful stewards.

"For I know the plans I have for you, declares the Lord, plans for welfare and not for evil, to give you a future and a hope." (Jeremiah 29:11)

Two Free Services to Help You Find God's Plan of Stewardship

G

od has entrusted all of us with various resources—time, money, skills, property, etc. As His earthly representatives, He calls each of us to manage these resources in a way that reflects His wisdom, love, and care for His creation, both during and beyond our lifetime.



There are two outcomes of the estate design process. Often MTW's estate design affirms that everything is in order. However, some people realize they need to make changes to their plan.

MTW's Center for Estate and Gift Planning offers two free services to assist people in the stewardship of the assets God has blessed them with. Our estate design and gift planning process helps people discern God's plan for their estate and ensures the estate is distributed according to their understanding of His plan. MTW's personalized estate

designs and gift plans also maximize the benefit of an individual's assets to reach their personal goals of providing for their loved ones and making a difference for the kingdom.

Estate Design

Our estate design service is a confidential review of someone's current estate plan from a biblical stewardship perspective. The first step is to take inventory of all the estate data (people, property, and plans) and prayerfully consider God's plan for the estate. Once MTW has compiled the data, a specialist creates an estate design illustrating the best way to reach the distribution goals. Additionally, the design blueprint explains the basics of federal estate taxation, lists available options for reducing taxes, and provides insight on the best way to make provision for family members.

There are two outcomes of the estate design process. Often MTW's estate design affirms that everything is in order. However, some people realize they need to make changes to their plan, at which point they consult their other advisors to update their documents.

If your documents are outdated or there have been changes to your family circumstances or changes to your estate, you may want to consider going through our free and confidential estate design process.

Gift Planning

In order to help people meet their personal and family needs and reach their giving goals, MTW offers personalized gift designs. These custom gift design proposals are tax-advantageous solutions for ministry partners seeking to make a major contribution. The gift proposal explains the impact of the gift on one's estate, the potential tax savings as well as a description of the non-tax advantages, and a step-by-step guide on the giving process through the completion of the gift.

MTW's gift proposals demonstrate how to make a gift out of many different types of assets including appreciated real estate or securities, a lump sum of cash, or an estate transfer.

Estate and Gift Planning Tools

MTW's Center for Estate and Gift Planning uses a variety of estate and gift planning tools to help people in their stewardship and giving goals. Each of these charitable giving vehicles provide immediate tax benefits. They are also great avenues for reaching financial security while supporting global missions.

Charitable Gift Annuity – A charitable gift annuity is a planned giving contract between an individual and MTW. In return for a charitable gift, MTW will pay the donor a fixed sum for life. The donor also receives a current charitable income tax deduction. At the time of the donor's death, the remainder of the gift is used for MTW's missional purposes.

Charitable Remainder Trust – After assessing a ministry partner's goals and needs, the donor will transfer assets into a charitable trust and the assets will be sold. The proceeds are invested in a portfolio managed by MTW and the donor receives income from the trust for life and a current charitable income tax deduction. At the time of the donor's death, the remainder of the trust assets go to MTW and any other ministries the donor specifies.

Donor-Advised Fund – With the help of an MTW gift planning specialist, a donor sets up and funds a Donor-Advised Fund with MTW. Once the DAF is funded, the donor recommends grants from the DAF to MTW missionaries, projects, their church, or other tax-exempt organizations.

We Can Help

If you would like to learn more about MTW's estate and gift planning tools and services, please feel free to call Beth Billingsley at 678-823-0028 or email her at beth.billingsley@mtw.org. Design your legacy today. ■

Lay Up Treasures in Heaven
By Dr. Lloyd Kim

Lloyd Kim



"Do not lay up for yourselves treasures on earth, where moth and rust destroy and where thieves break in and steal, but lay up for yourselves treasures in heaven, where neither moth nor rust destroys and where thieves do not break in and steal. For where your treasure is, there your heart will be also" (Matthew 6:19–21).

All of us feel the constant pull toward worldly priorities and possessions. The world tells us that we can find joy and satisfaction in the things of this life. We think that if we have the right job, the right car, the right house in the right neighborhood, we'll be content.

In Matthew 6:19–21 Jesus exposes the false promises of these earthly treasures. He points out the obvious, reminding us that the riches of this world are temporary. If we spend our lives pursuing material things, we will inevitably be disappointed because they don't last. C.S. Lewis describes the power of materialism as the wicked witch who gives her victims food that causes great hunger.

In contrast, Jesus tells us to store up treasures in heaven. The truth is that everything we have on our final day will be lost. Jesus, therefore, wants better things for us. He desires His followers to seek the true, eternal pleasure secured for them in heaven.

What is this heavenly treasure that should capture our hearts? God.

Through His sacrifice, Jesus has freed us from placing our significance in the things this life has to offer and gives us access to God Himself. Earthly riches do not compare to what we already have in Christ or our future inheritance.

In this passage, Jesus forces us to question where our allegiance lies. Is it to the kingdom of this world or the kingdom of heaven? When we orient our hearts toward God and His gospel promises, we will desire God's name to be proclaimed throughout the world instead of our own. Our highest priority will be the expansion of His kingdom. We will dedicate our lives to being disciples and making disciples of all nations.

All that we give, all that we sacrifice for God's kingdom is really a way of expressing that God is our greatest treasure. When we forfeit comforts in this life and devote our resources so that others may come to worship king Jesus, we are storing treasures in heaven.

Let us give thanks for the eternal inheritance Christ secured for us through His sacrifice on the cross. As we set our gaze on heaven, let us ask God to help us treasure Him above all else in our hearts and prioritize the advancement of His kingdom in our lives. ■

This spiritual paradigm distinguishes MTW's Partner Relations Department from many other organizations. Most teaching on Biblical stewardship is about managing resources during a person's lifetime. But because God is the owner of all then He should be the one to determine the distribution of the trust at the time of the steward's death. A Christian's documents, whether it is a will or a living trust, is nothing more than the distribution clause of their stewardship trust before God.

Therefore, Bruce and the Partner Relations team's goal is to encourage people to consult the owner of their estate and help them find and implement God's plan of stewardship.

Practically speaking, the estate design service provides direction for people so that they can "set their house in order" (Isaiah 38:1). This goes beyond finances. The Partner Relations team helps people consider if their house is in order spiritually, relationally, and financially. The financial piece means making sure a family's documents reflects their understanding of God's plan of stewardship for the distribution of their estate for this season of life.

Another important question asked when approaching estate design with this philosophy of ministry is, "Is it not right that God would have someone to include their church, ministries, or kingdom

passions in their estate documents?" Many families have the potential to give far more at death than they ever gave during their lifetime.

According to Bruce, MTW's estate design service is often the first time many people view the process from a spiritual perspective. Some realize they had only been thinking about Scripture's instruction on stewardship as it applies to their

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lifetime. And while the Bible clearly teaches Christians are to responsibly manage the riches God gives them while on earth, it is just as important to consider God's direction in the distribution of the riches after He calls them home.

"We've always had this philosophy of ministry," said Bruce. "This is the way we work with people; we help them find God's plan for the distribution of their estate."

Over the course of 27 years, the Center for Estate and Gift Planning has processed over 2,000 estate designs. "Most of the people who have gone through the estate design process appreciate the spiritual approach we take over the mechanical tools," said Bruce.

Last year, Bruce turned over the leadership of the Partner Relations Department to Timm Sasser and moved into a new role as Director of the Center for Estate and Gift Planning. He continues to impact the lives of countless families with the Center for Estate Design and Gift Planning's stewardship teachings and services.

"Bruce is peerless in his knowledge and heart for this ministry, and the work he continues to do at this stage in his career is astounding. The more narrow the focus the deeper the impact and we have seen that in Bruce's leadership of the Partner Relations Department," said Timm. "Bruce is not only a pastor and teacher in his home and to his family but also at MTW and in our department. He set the standard we walk in as we serve our partners and churches."

The concept that biblical stewardship is spiritual before mechanical continues to guide the work of MTW's Partner Relations Department and Center for Estate and Gift Planning. This will continue to be their philosophy of ministry for many years to come. ■

We trust you have found this issue of **Partners in Planning** to be helpful. We look forward to answering any questions you may have about the information shared here.

Please take time now to complete the response card to receive information on our estate design and gift planning services. We are here to help you in any way we can.

Please write or call our office to let us know how we can be of assistance.

For will and estate planning purposes, our legal name and address are:

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