



ST. LUKE'S FOUNDATION

Legacy News

August 2022

Foundation Sponsors Upcoming Events

The Foundation Committee expected to sponsor a pair of events in 2020 and again in 2021. With the onset of COVID early in 2020 those plans evaporated. The Committee believes the third time is the charm. Read below to get the full scoop!

Life Decisions and Legacy Planning Seminar

Come one, come all. Planning for the future is important for all ages. We can't see into the future but we can plan for it if we have the information to make educated decisions. Regardless of age, we all are often reluctant to even think about our own future, let alone attend learning sessions; that future feels further away. The reality is being prepared is the best course of action and this is an opportunity to do so with no pressure or expectations. Being proactive adults – young or old – helps us make informed decisions because “knowledge is power.” St. Luke's Foundation has arranged for professionals in the field and the series will start on September 18, 2022. Feel free to attend one or all of these sessions.

The Seminar series will be weekly and sponsored by the Foundation. It will be presented in 45-minute sessions over five Sundays at 10:00am in room 203 focusing on life decisions and related planning and challenges. Dates and topics follow:

September 18: Planning Your Celebration of Life. Presenter Pastor Tim will discuss planning your service and related considerations. Pastor Tim has a wide range of experiences in helping families cope with difficult decisions and end of life planning. www.stlukes-elca.org/who-we-are

Scholarships

In 2022 the Foundation funded twelve scholarships, which the Scholarship Committee awarded totaling almost \$26,000. Seven of those scholarships were for \$1,000 and four scholarships were awarded for \$2,000 while the Connie and Willard C. Hefty Memorial Scholarship was for the value of one year's tuition at UW Madison (\$10,766).

Taviahna Tanin has received several scholarships over her college career from the Foundation. She recently wrote - “I have graduated from Concordia College with a business degree and will be starting my job in June working for Coyote Logistics. I appreciate all the support I have received from St. Luke's and I am excited to continue growing my faith no matter where I am.”

September 25: Advanced Care Planning Conversations to Respect Your Wishes

Presenter Linda Briggs, Author of “To Know and Honor: Building a Culture of Person-Centered Decision-Making” How to think and talk about health care choices with family and physicians. Linda Briggs - MSN, MA, RN is a program developer and researcher with 25 years of nursing experience. www.capc.org/about/faculty-advisors/linda-briggs

October 2: Funerals - Advance Planning. Presenter Chad Walhood, Gunderson Funeral and Cremation Care Burial, cremation, and related funeral home considerations.

Gunderson has funeral homes in Cross Plains, Fitchburg, Lodi, Madison, Middleton, Oregon, Stoughton, Mt. Horeb and Black Earth. www.gundersonfh.com

October 16: Estate Planning. Presenter Virginia Bartelt will discuss Effectively Documenting Your Wishes - Wills, trusts, power of attorney and health care directives. Virginia focuses on estate planning matters and probate administration. Over 13 years legal experience. www.barteltgrob.com/our-attorneys/virginia-bartelt-wi-attorney

October 23: Leaving a Legacy. Presenter Aaron Achenbach will discuss investment and insurance considerations along with

communicating plans to family members. Aaron specializes in policy options to fit any budget and needs. Supplemental health insurance, disability insurance, tax deferred annuities, retirement savings, investment objectives, risks and expenses. www.statefarm.com/agent/us/wi/middleton/aaron-achenbach-qyx8x43r000

2nd Annual St. Luke's Foundation Reception

The Foundation Committee is excited to announce the 2nd Annual St. Luke's Foundation Reception will be on Sunday, October 9 starting at 4:00pm. This is not a fund raiser but a celebration that is open to everyone interested in learning more about the Foundation as well as acknowledging those who have supported the Foundation over the years. Thank you for your continued interest and support of the Foundation! The Foundation would not be here without your generous support. Please mark this date on your calendar.

**The Foundation Committee
appreciates your support and
presence at one or all of these
events. See you at St. Luke's.**

Foundation Financials

Tom Scott, Treasurer

St. Luke's Foundation has not been immune to the volatility of the financial markets. As of June 30, 2022 the Foundation experienced a decline in invested assets market value of \$159,340 (\$1,044,095 to \$844,750). This 15% decline, while significant, compares well to the S&P 500 year to date decline that currently sits at negative 20.23%. St. Luke's Foundation exceeded the broader market based in part on the recent diversification of the portfolio. Underperforming bonds were reduced and replaced by alternative investments better able to withstand the overall market volatility. These alternatives, generally available only to larger accounts, focus on high value corporate bricks & mortar assets. In addition to these investment changes, consistent with the Council's approved investment policies,

the Foundation Committee has taken a very conservative non-panic approach to our current holdings. Accumulating cash is being held in reserve ready for investment as the markets begin to rationalize themselves. The Foundation maintains market rate accounts in local banking facilities held primarily for near term use requirements. These accounts enable the Foundation to respond to cash needs without necessitating a market sale.

Current Assets:

Market and Market Alternative investments:	\$884,750
Cash on hand – Undesignated	\$ 23,014
Cash on hand – Designated	\$ 6,457
Total of all funds	\$914,221

Foundation Grant Aids Stephen Ministry

The Foundation Committee received a grant request to provide funds for Steve Luecke to attend the Stephen Ministry Leadership Training Program. This request was approved by the Foundation Committee. Upon completion of the program, Steve along with his co-leaders Ruth Fruehling and Maureen Oostdik were able to recruit two additional St. Luke's members, Lea Cornell and Donald St. Pierre, as future Stephen Ministry leaders. A second grant request was sent to the Foundation Committee and funds were approved for them to attend the Stephen Ministry Leadership Training Program, which they are presently completing.

These five will be working together as a leadership team to train future St. Luke's Stephen Ministers. The goal is to train

10-15 Stephen Ministers, who will minister and care for people who are hurting, confused, mourning, and those lost from God's love. Over the history of the Stephen Ministry program the primary users have been the older age group, but Stephen Ministry can assist, support and work with all age groups--both younger and older.

Steve indicated that thanks to the Foundation for providing funds for training and updated materials, the Stephen Ministry leaders will be able to kick-start and invigorate the Stephen Ministry program at St. Luke's.

Steve stated that this is an exciting time as St. Luke's expands in-person ministry overall and a revitalized Stephen Ministry will enhance care for hurting people both inside the congregation and from our broader community. Stephen Ministry is truly central to the purpose of St. Luke's to "Connect, Serve, and Grow in Christ's Love".

Foundation Gifts

Both current and future gifts to the Foundation are welcome and greatly appreciated as we prepare for our future. While gifts over \$10,000 may be designated for any purpose you feel is important to our church, any gifts are welcome and may be directed to:

Scholarships
Music
Ministry Areas and Missions
Building and Property Needs
General Foundation

Gifts should be specifically identified as going to the Foundation. For more information, contact St. Luke's office staff or Committee members.

Foundation Balance

12/31/2021	\$1,107,316
06/30/2022	\$ 914,221

Thank You's!

The Foundation Committee would like to thank the Scholarship Committee for their time and dedication in interviewing all applicants and awarding 2022 scholarships. These St. Luke members are: Gary (Kope) Kolpin Chair, Sonja Hungness, Lynda Nelson, Mike Solheim, Molly Tormey, and Derek Ward. Ron Lee is the Foundation Liaison to this Committee.

Committee Members:

Andy Roquet, Chair
Mary Schwoch Vice Chair
Tom Scott, Treasurer
Paul Raisleger, Secretary
Linda Janousek
Ron Lee, Scholarship Liaison
Sylvia Donaldson, Council Liaison

Newsletter Editors:

Mary Schwoch
Linda Janousek
Tom Scott

St. Luke's Foundation Mission Statement

We proclaim and serve Christ... Here, there, and everywhere

~Now and into the Future~

