PRESENTATIONS

Available Presentations for your Church

About Covenant Trust Company

Covenant Trust Company [CTC] is a unique resource for individuals and organizations that provides financial expertise from a faith perspective. Everything we do has its foundation in stewardship; managing the resources that God has given in a way that will honor Him and help to do His work.

CTC is a for-profit Illinois Trust Company owned by its founding shareholders: Covenant Ministries of Benevolence, North Park University, and The Evangelical Covenant Church.

Covenant Trust Company currently manages nearly $700,000,000 in endowment funds, individual and institutional investment management accounts, personal and charitable trusts, charitable gift annuities, and Individual Retirement Accounts.

CTC has been providing professional trustee services and asset management for twenty-five years. In addition, our staff and Financial Services Representatives welcome the opportunity to offer educational presentations on various financial topics. Some of them are described on the second page of this brochure.

Financial expertise from a faith perspective

We invite you to contact us if you're interested in more information or to schedule a presentation.

By telephone

Toll free 800.483.2177

Local 847.583.3200

By e-mail

info@CovenantTrust.com

Website

CovenantTrust.com

You may also contact your local CTC Financial Services Representative
[see our website at *CovenantTrust.com*
for a directory.]

A Financial Life in Order

"A wise person thinks ahead" Prov. 13:16 Wills, Trusts and Money Management. Getting your financial life in order can free you to do what you are called to do.

Women and Finance…Let's Talk

A study in Money Magazine shows that 9 out of 10 women will be the sole financial decision maker at some point in their lives. Specifically geared toward women and covers topics of estate planning documents and investing.

Social Security and You

Many people find Social Security complicated. Make the most of your benefit by looking at all the options.

Creative Giving

The Sunday morning offering plate is not the only way to give. Learn about new and creative ways of giving that can benefit a ministry and the donor as well.

Are You Being Fleeced?

Identity theft, scams and traps—how to recognize them and protect yourself.

Ask the 'Investment Guy'

Hear the latest on the market and CTC's investment strategies—presented by our Director of Investments.

Managing Your Stuff

Everyone has 'stuff' and managing it can be overwhelming. Learn some tools to inventory and organize.

Finishing Well

According to a survey conducted by the Pew Research Center, Americans today are more worried about their retirement finances than they were at the end of 2009. Smooth the way through retirement's unique financial challenges.

Ask Covenant Trust

This event can be scheduled as an open forum for questions and concerns about finances or as a day for taking individual appointments.

COVENANT TRUST COMPANY®

Investment Management · Trustee Services · IRAs and Retirement Investing · Endowments · Legacy and Gift Planning

Grow Your Future

The Key to More Bequest Dollars for Your Ministry

As a leader in your ministry, you want to do all you can to ensure its future. You want to help it grow, touch more people, and be more effective in its work. We want to partner with you to make that happen.

Bequests and other legacy gifts bring unexpected blessings and opportunities to ministry. But these gifts don't just happen. Like any other worthy endeavor, they take a little work. The good news is that Covenant Trust Company is here to work with you:

- We'll work with you and any other members of your staff who need help with personal financial or legacy planning
- We'll provide the same personal assistance to any member or friend of your ministry who wants to include the Lord's work in their legacy planning
- We'll present an informative workshop about how to be a better steward of what God has given each of us through financial and legacy planning
- We'll help people get it done now, *and be there to work with them in the future.*

That's what we'll do—what do you have to do? It boils down to two simple things:

- Get your ministry's message out to your members and friends—tell them your needs and that legacy gifts are another way to help your ministry.
- Invite your local Financial Services Representative to meet with you and/or your board, and present a workshop for your ministry.

What does it cost our ministry to sponsor a workshop?

Nothing. We work with you to find a mutually agreeable date and time. There is no advance charge for materials, and no fee for the Financial Services Representative to present the workshop.

If we host a workshop, will people be asked to make bequests to ministries other than ours?

No, the choice is always up to the individual. *If you have conveyed the mission and need of your ministry, your members and friends will want to help.* Some of them will also have interests beyond your ministry which they may wish to include in their legacy plan. We impose no restrictions or requirements on which Covenant ministries should be included in an individual's personal legacy plan.

What benefit does our ministry get?

More bequest dollars. Bequests received today were planned some time ago. Plans people make now will benefit your ministry in the future. Also, folks will often include a ministry in their legacy plan and not tell anyone, so that it comes as a total surprise when a distribution from their estate is finally received.

Our informative workshops provide helpful information for people of all ages as they work through the lifelong journey of financial and legacy planning.

Workshops include:

"A Financial Life in Order"

"Social Security and You"

"Let's Talk": Women and Finance

"Creative Giving" Supporting a capital campaign with gifts other than cash

Other mini-workshops are available on a variety of topics.

We will also meet with your board about any asset management needs your ministry may have, such as setting up an endowment fund, or managing other ministry funds.

Visit our website at www.CovenantTrust.com to contact your local Financial Services Representative.

"I am very pleased with the wonderful and caring service Covenant Trust Company has provided to our church. They provide an invaluable service in helping Covenanters accomplish their giving wishes… I highly recommend churches use the resources of Covenant Trust Company to empower their members' giving goals. I also bear witness that Covenant Trust Company has been a source of personal help to my wife and me in making decisions for our wills and trust agreements. It is a joy to know my family is cared for in this way; but also that I can minister through my personal gifts to the Covenant ministries of my choice."

Rev. Paul Bengtson

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