

Surrounded by Books!

By Pat Bilow

The library at The Chapel School in **Bronxville, New York**, provided the perfect setting. Surrounded by several thousand books, **Dr. Cliff and Sharon Peterson** were in their element as they penned their signatures to the documents that made their estate planning official, while their attorney Debra Arena, a fellow Lutheran, looked on.

Aside from the prominence of their Savior Jesus, books reign in the Peterson's lives! Sharon has 31 years' experience as a librarian, most of which have been for The Chapel School of Village Lutheran Church, Bronxville, which sits across the road from Concordia College, where Dr. Peterson served as a Professor of Biology and Dean of Students prior to his retirement. The Petersons already had an estate plan in place, but after Sharon picked up a sample Christian Preamble brochure at the LWML Portland Convention, they decided a preamble before their will would provide an opportunity to give witness of their faith to their heirs.

The following year, Sharon attended my workshop at the Atlantic District LWML Convention, where she heard about charitable estate planning options. Some of it seemed to be a good fit for her and Cliff. This was followed by visits in their home and numerous phone calls throughout months of planning.

Eventually, they decided to establish an Endowment Fund with their taxable assets at the death of the second spouse. This will provide income to the ministries they so

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dearly love. The remainder of their estate will be divided among their heirs, along with a testamentary charitable trust that will provide income to their son, Shankar, whom they adopted years ago from India. After their attorney reviewed the charitable trust draft provided by LCMS Foundation, the Petersons, under Debra's counsel, signed the final documents in Sharon's school library at no cost to the donor for the Foundation's work.

"Now that I look back on the past year, I really feel that this was all directed by the Spirit of the Lord," Sharon reflects. "I have had such a sense of peace and inner good feeling that this was the right step to make for Cliff and myself."

Sharon and Cliff later referred another LCMS couple for gift planning counsel. This has been leading to several more charitable gift-planning presentations in the New York area. Truly, God is good!

For more information on charitable planning, go to www.lwmlgiftplan.org and click on Wills Videos or call 1 (888) 482-8425.