

WHY NAME A BENEFICIARY?



Important reasons for naming a beneficiary on your WELS Church Extension Fund (WELS CEF) investment:

- ✦ Have the satisfaction of knowing that your WELS CEF investment will be distributed to the individual and/or organization of your choice upon your death.
- ✦ Avoid probate, a sometimes lengthy and costly process, upon your death. Named beneficiaries will immediately receive the proceeds of your investment without a fee.
- ✦ Maintain control over your WELS CEF investment during your lifetime.
- ✦ You may change beneficiaries at any time.



WELS Church Extension Fund
Wisconsin Evangelical Lutheran Synod

A beneficiary gift becomes a legacy

If your heart leads you to name WELS CEF, WELS, or your congregation as a full or partial beneficiary of your WELS CEF investment, you have the added benefit of knowing that your gift has a lasting impact.

A Gift to WELS CEF

If you name WELS CEF as a full or partial beneficiary of your investment, the proceeds are added to the WELS CEF Assistance/Grant Fund. These gifts are used to make grants to qualified mission congregations so they can purchase land and build or renovate worship facilities—used as tools for gospel outreach. For your convenience, an easy-to-use beneficiary designation form for gifts made to WELS CEF is included. Just complete and return this to WELS CEF. If you wish to change or add other beneficiary designations, please use our standard beneficiary form.

For more information about naming a beneficiary, call 1-866-511-7793. Beneficiary forms are available on our website: wels.net/cef.

AUTHORIZATION

I hereby authorize my WELS CEF certificate # _____
to be made payable on death to WELS CEF.

(Please print)

Name: _____

Address: _____

City: _____ State: _____

Zip: _____ Telephone: _____

Congregation: _____

Location: _____

AUTHORIZED SIGNATURE(S)

This information is general in nature and should not be considered as specific or comprehensive advice. WELS CEF does not provide legal, accounting, or tax advice. You may want to consult your attorney and/or tax advisor as to the applicability of this information to your own situation.

The purchase of WELS CEF securities is subject to risks, which are described in our Offering Circular. This is not an offer to sell, nor the solicitation to buy, our securities. We will offer and sell our securities only in states where authorized. WELS CEF certificates are unsecured general debt obligations. WELS CEF is not a bank or regulated financial institution.

This offering is made solely by the Offering Circular.

*Not FDIC or SIPC insured *Not a bank deposit *No WELS guarantee

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