

Giving Maximization Analysis (GMA)

Most affluent, Christian families we serve, prior to our work with them, were unknowingly falling far short of maximizing their lifetime and testamentary giving to support the Kingdom of God.

1. They were not aware that they were failing to take full advantage of all the possible annual giving strategies available to them. (Some of our clients are currently giving in excess of 58% of their Adjusted Gross Income with no loss of deductibility.)
2. They were not aware that they were paying huge sums in needless capital gains taxes which could have been given to support Kingdom causes instead of to the IRS. (With their Master Stewardship Plan implemented our clients never pay any capital gains taxes when they sell their appreciated assets.)
3. They were not aware that they could arrange their wealth transfer plans to totally eliminate all estate taxes on their accumulated wealth and could, instead deploy those same funds to the ministries and Christian causes they most care about instead of needlessly sending them to the IRS. (Our families never pay any estate taxes, ever, no matter how much they want to get to their heirs.)

As an example, over the past three years, we have helped affluent families eliminate tens of millions of dollars in unnecessary income/capital gains taxes and over hundreds of millions of dollars in needless estate taxes with strategic stewardship planning.

And leveraging those tax savings through the implementation of a comprehensive, integrated Master Stewardship Plan these families have been able to increase both their lifetime and testamentary Kingdom giving by a half a billion dollars more than what they were already giving or planning to give in the future.

Are you maximizing your giving with what the Lord has entrusted to you? A Giving Maximization Analysis (GMA) can reveal if you are indeed giving all you can with all you have.

“From everyone who has been given much, much will be required; and to whom they entrusted much, of him they will ask all the more.” (Luke 12:48b)