

A photograph of a sailboat on the water, viewed from the deck looking forward. The sky is blue with scattered white clouds. The water is a deep teal color with small waves. The boat's deck is white, and a white sail is visible on the right side. The text is overlaid on the image.

Missouri United Methodist
Foundation

2012 Review

Your path led through the sea,
your way through the mighty
waters, though your footprints
were not seen.

-Psalm 77: 19 (NIV)



“May the Lord direct your hearts to the love of God and to the steadfastness of Christ.”

2 Thessalonians 3:5 (ESV)

Dear Friends,

Together we have again circled the sun and pause in this moment to marvel at the journey – at blessings shared and trials endured. This Annual Review is an attempt to hold a still-point in the midst of motion so that we may catch our breath and check our bearings.



My sailing ship on the Missouri ocean is usually a rental car. (And the waves can get really interesting in some of those Ozark hollers.) My destinations are churches large and small in cities, towns and in open country. The typical topics of conversation are the very things addressed in this publication – investment returns, grant applications, scholarships, planned gifts, and how to use the Foundation to support the work of the local church.



The work of the local church takes many forms these days, but it is usually best expressed at the very beginning of each meeting. We pause a moment, wait for a bit of stillness to descend, and ask for God to bless – to grant wisdom – to guide – so that our efforts lead to the fulfillment of God’s purposes for the world God loves. Together we strive to sense that divine compass – that fixed point of reference – and to steady the trembling hand so that we might move forward in faith.



As you read through these pages, consider where God may be leading you and your congregation and how the Foundation might help on that journey. Would a scholarship endowment complement your church’s outreach to youth? Has your church received a major gift that is languishing in a savings account or CD? Would you or others you know be interested in a way to give a gift that also pays you income? Could an endowment for missions help better connect your congregation with the surrounding community? Would a Foundation Ministry Grant help your church start a new worship service or build a new playground?

The voyage is long, and the possibilities are endless – and as a wise man once said, “The best of all is, God is with us.”

Yours in service,

David P. Atkins



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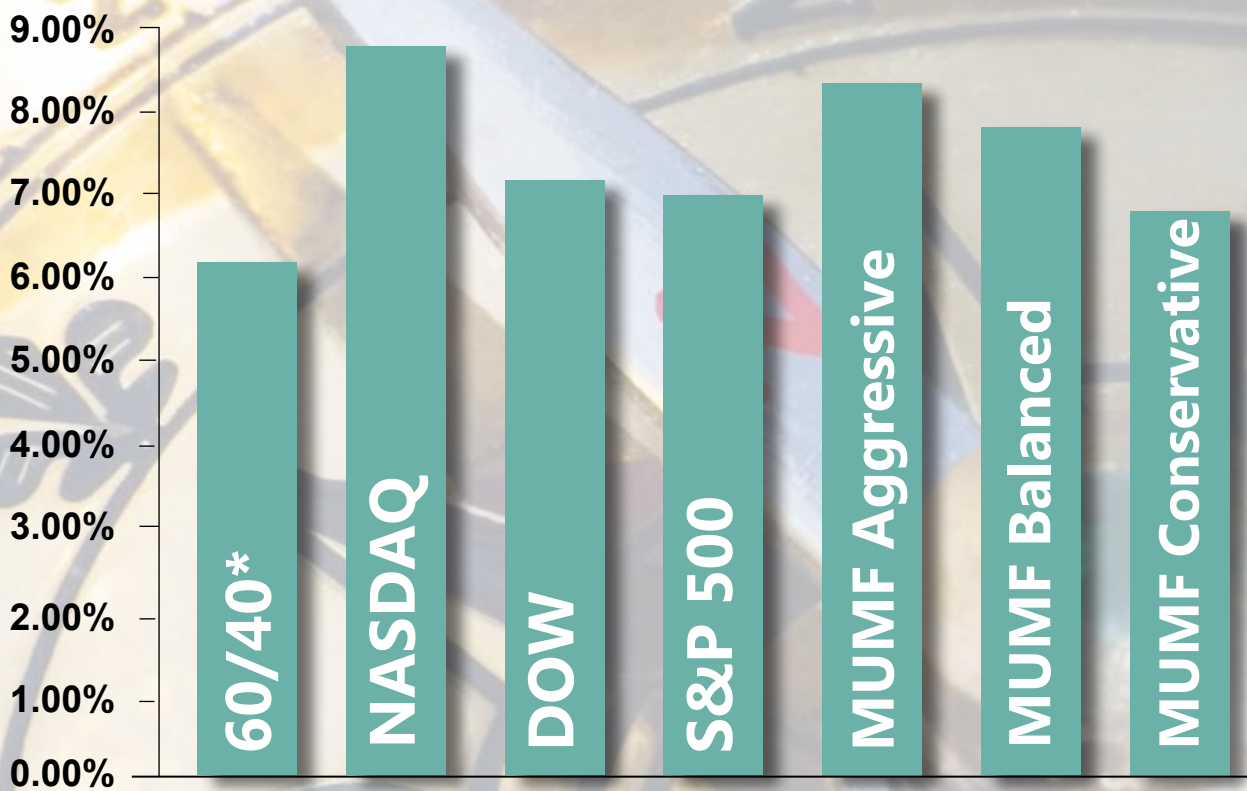
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Kendall A. Waller, Conference
Treasurer

2012 Fast Facts

- \$72,205,140 : Total assets under management
- \$44,627,952 : Market value of investment accounts owned by 158 Missouri United Methodist churches and 33 UM institutions & agencies
- \$2,388,927 : Dollars withdrawn by churches for use in ministry
- \$3,459,028 : New dollars contributed by donors to permanent funds or deposited by churches and UM institutions into investment accounts
- \$5,662,734 : Market value of all gift annuities and charitable remainder trusts under administration
- \$447,847 : Annuity or unitrust payments made to charitable gift annuitants and trust holders
- \$185,000 : Donated to create new charitable gift annuities benefiting UM churches and institutions as determined by donors
- \$603,572 : Proceeds to UM churches and institutions processed through the Foundation's Stock Gift Pass Through program
- \$202,855 : Grants awarded to churches and related ministries
- \$64,000 : College scholarships awarded to United Methodist undergraduate students
- \$53,250 : Seminary scholarships for UM divinity students
- 0.73% : Foundation operating expense as a percent of asset value

INVESTMENT PERFORMANCE

Ten-year Annualized Average Net Returns
(as of 12/31/12)



*A non-diversified blend of 60 percent stock (S&P 500) and 40 percent bond (Barclays Agg)

AGGRESSIVE FUND

TOTAL ASSETS:

\$36,280,948

Historical Returns (%)*

Last 12 Months:	13.1
Last 3 Years:	7.6
Last 5 Years:	1.4
Last 10 Years:	8.3
Since Inception: (June 1994)	8.7

BALANCED FUND

TOTAL ASSETS:

\$31,222,413

Historical Returns (%)*

Last 12 Months:	11.4
Last 3 Years:	7.8
Last 5 Years:	3.4
Last 10 Years:	7.7
Since Inception: (December 1990)	8.1

CONSERVATIVE FUND

TOTAL ASSETS:

\$2,577,295

Historical Returns (%)*

Last 12 Months:	8.5
Last 3 Years:	7.6
Last 5 Years:	5.4
Last 10 Years:	6.9
Since Inception: (April 1997)	6.2

* Historical returns are time-weighted and net of all costs, commissions and fees associated with the investments. Returns for periods greater than 12 months are annualized. Please refer to the Disclosure Statement for a full description of costs and fees. Past performance is no guarantee of future returns.

TOTAL ASSETS UNDER MANAGEMENT

	December 31, 2011 Audited	December 31, 2012 Unaudited
Unrestricted Net Assets	10,207,985	11,296,423
Temporarily Restricted Net Assets	3,537,962	1,864,606
Permanently Restricted Net Assets	6,126,026	8,753,424
Agency Investment Accounts	39,665,471	44,627,952
Charitable Gift Annuities	3,165,690	3,641,230
Charitable Remainder Trusts	2,084,837	2,021,504
Total	64,787,971	72,205,140

A Dynamic Financial Engine for Ministry

The Foundation's Balanced Investment Fund has been in continuous operation since 1990. Its performance illustrates how prudent diversification and structured long-term investment and spending policies can be a dynamic engine for funding ministry.

For example, a \$100,000 investment in the Balanced Fund in 1990 would today be worth \$358,147 if no distributions were taken. However, most Foundation funds distribute an annual income or spending rate. Taking that same investment and drawing out 5% each year for ministry would look like this:

Foundation Balanced Investment Fund



The Foundation helps visionary donors and church leadership make a difference today and far into the future. The fiduciary oversight and long-term continuity provided by the Foundation can help ensure that endowments, scholarship funds, designated gifts and other long-term assets are administered appropriately and effectively.

Contact the Foundation office at 800-332-8238 or visit us online at www.mumf.org to learn more and to schedule a Foundation representative to meet with your next board meeting.

Charitable Gift Annuities



Charitable Gift Annuities provide income for the life of the annuitant and the remainder of the charitable gift benefits a United Methodist charity designated by the donor.

Listed are gift annuities established at the Foundation with charitable beneficiaries in bold.

Avondale UMC-Kansas City

Margery Kuhler (7)

Blue Springs First UMC

Anonymous

John & Katherine Rosendahl

Bolivar UMC

Frank & Rita Terhune

Campbell UMC-Springfield

Frances M. Lampe

Central UMC-KC

Sally Firestone

Central Methodist University

Ruth A. Benner

Dorothy I. Bingham

Raymond & Catherine Carnes

Donald A. Davis (2)

Robert L. & Velma F. Felt

Treva S. Hall

Elizabeth Vahle

Christ UMC-Independence

James & Juanita Knight

Church of the Shepherd UMC

Anonymous

Clinton UMC

Bettyrae Fluke

Cornerstone UMC-O'Fallon

Frank Davis (2)

Country Club UMC-

Kansas City

Edward C. & Mary Ellen Olsson

Jeannette Ragan

Della Lamb-Kansas City

Anonymous

Donor's Local Church

Ruth A. Benner

Maxine Zeckser

Epworth Family Services- St. Louis

Jack Adams

Bernice Chastain

Evelyn Donnell

Carl & Shirley Garrett

Guy & Joan Johnson

Betty A. Melby

Evelyn Terrall

Elizabeth Vahle

Foundation

Anonymous

M. Eileen Crabtree

Robert L. & Velma F. Felt

Byron & Joyce Gilbreath

Warren & Mary Ellen Meyer

J. L. & Lois Mondy

Gambrill Gardens-St. Louis

Ted G. Matkin (8)

Valeria Murray (2)

Glasgow UMC

James & Claire Matthews

Hannibal First UMC

Anonymous (2)

Donna J. Setterberg

King's Way UMC- Springfield

Anonymous

William & Joyce Clark (2)

Rita A. Cook

King's Way UMC

Mission Endowment

Ruth Ann Auner

Kingdom House-St. Louis

Anonymous (4)

Jack Adams

Ted Matkin (2)

Glenna Mae McClain

Mary Ellen Meyer

Kingswood-Kansas City

Howard Jeter

Sally Firestone

Kirkwood UMC

Evelyn Terrall

Deane & Fancine Thompson

Lee's Summit UMC

Anonymous (2)

Lincoln UMC

Juanita M. Hovendick

Manchester UMC

Anonymous (2)

Allie Garrison

Richard Vreeland

MO Area Office of

Camping & Retreat

Ministries-Blue Mountain

Elizabeth Vahle

MO Conference

Congregational Development

Virginia Ruth Bronson

Robert & Lois Windsor (3)

Mt. Gilead UMC

Eugene Bill Roberts

Mt. Zion UMC-St. Louis

Ted Matkin (8)

Newhouse-Kansas City

Dortha Mae Olsen

North Kansas City First UMC

Wanda Ebert

Marion Gentry

Mary Lou Gentry

Marjorie Hendren (3)

Ione McIntyre

Ohio Street UMC-Butler

Anonymous (3)

Open Hearts UMC-Wright City

Joe & Janet Laws

Oregon UMC

Elizabeth Waller

**Ozarks Methodist Manor-
Marionville**

Anonymous

Dorothy I. Bingham

Cecil Ferguson

Betty Frederick

Pathways UMC- Springfield

Anonymous

Poplar Bluff UMC

Jerry & Ernestine Arnold

Potosi UMC

Rose Mary Elliot

Glenna Mae McClain

reStart-Kansas City

Anonymous

Richmond UMC

Anonymous

Rolla First UMC

Gerald Huddleson (3)

Saint Paul School of Theology

Anonymous

Dorothy I. Bingham

Mike & Karen Farrell

Sally Firestone (4)

Gary Harms

Vivian Nolte

Ruth Nothdurft

W. Clark Randall (2)

Isabelle Sauer

Margaret Sonnenday

Elizabeth Vahle

Walter & Norma Wilkening

**Scarritt-Bennett Center-
Nashville**

Dorothy I. Bingham

Sikeston First UMC

Sara M. Bennett

Siloam Chapel

Cemetery Association

James & Claire Matthews

Spofford-Kansas City

Clifford & Mary Beth Seger

Maxine Zeckser

Margery Kuhler

St. Luke's UMC-Kansas City

M. Eileen Crabtree

St. Mark's UMC – Florissant

Anonymous

Stoutland UMC

James & Juanita Knight

Trinity UMC - Piedmont

Anonymous

UMCOR

Anonymous (2)

Gerald Huddleson (3)

Joe & Janet Laws

Byron & Joyce Gilbreath

University UMC-St. Louis

Betty A. Melby

Phyllis Vierheller

Webster Hills UMC

Lloyd & Betty Watkins

**Wesley Chapel UMC –
Kingsville**

Anonymous

Windsor UMC

Lela Baskins

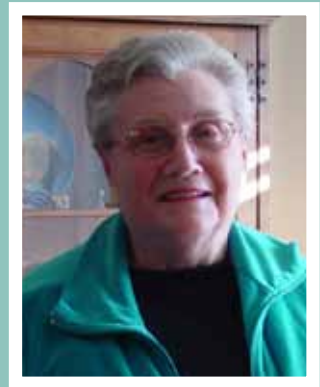
**Windsor United Methodist
Women**

Lela Baskins

**Wood's Chapel UMC –
Kansas City**

Anonymous

Eileen Crabtree created Charitable Gift Annuities that will benefit the Foundation and St. Luke's United Methodist Church.
“.. It's a good deal.”



Margery Kuhler established multiple Charitable Gift Annuities gifts that will benefit her church, Avondale UMC, as well as Spofford in Kansas City.

North Kansas City First UMC will be the beneficiary of Ione McIntyre's Charitable Gift Annuity. “The Foundation people were wonderful to work with. I used some stock to set up the CGA and they made it so easy- Everything went very well!”





Discover Your Own Charitable Gift Annuity

Step 1: Determine how much cash and/or property you wish to give.

Step 2: Contact the Foundation by telephone, mail or email and request an illustration. To create your illustration we will need your date(s) of birth and approximate gift amount. We will then mail (and/or email) the illustration to you, along with an application form and additional information.



Step 3: Review the illustration and informational materials. Discuss these materials with your trusted professional advisors (e.g., accountant, attorney) and with family members.

Step 4: When you are ready, complete the application form and return it to the Foundation. If you are funding the gift annuity with cash, simply enclose your check with the form. If you are funding the gift annuity with stock or other property, contact the Foundation for easy transfer instructions.



Step 5: The starting date for your gift annuity is the date that the donated gift is received by the Foundation. We then prepare and send to you a one and a half page gift annuity agreement for your review and final approval. Sign the agreement, and return it to the Foundation.



It is that easy. After your gift annuity is created, we will send you materials to keep for your tax reporting purposes. Your gift annuity payments will be delivered as you request, either by check or direct deposit. At the end of each year, you will receive a Form 1099 from the Foundation for your annual tax reporting purposes.

The payments remain fixed as long as you live. Then, the remaining value of the gift annuity is paid to the church, charity, and/or Foundation endowment fund that you have designated.



Contact the Foundation office at **800-332-8238** or visit us online at **www.mumf.org** to learn more.

Designated Funds

The following funds provide income to a church, agency, or ministry as designated by the donor.

Beneficiaries receiving income are listed in bold.

Asbury Theological Seminary

Missouri Asbury Alumni Association
Scholarship Fund

Auxvasse Municipal Cemetery

Auxvasse UMC Perpetual Cemetery Care Fund

Avondale UMC

Lloyd & Adena McKemey Memorial Fund

Belgrade UMC

Belgrade UMC Scholarship Fund

Blue Springs First UMC

Inez Dexheimer Scholarship Fund

Bolivar UMC

Dunnegan Memorial Permanent Trust

Broadway UMC

James & Marjory Mordy Charitable Fund

Brock UMC Cemetery

Lawrence Family Memorial Trust

Carolyn Belshe Orphanage-Mozambique

Anonymous Woodlandville UMC Mozambique
Orphanage Fund

Cassidy UMC

Betty Ann Rogers Memorial Fund

Centenary UMC-Bonne Terre

Ellen O Kottwitz Memorial Scholarship Fund

Centenary UMC-Cape Girardeau

Frank Bean HVAC Fund

Central Methodist University

Henry F & Roberta H Niemann Memorial Fund
Rev David W Richardson Memorial
Endowment Fund

Dorian S Taylor Scholarship Trust

The Unity Award Endowment Fund

Centralia UMC

Ellen O Kottwitz Memorial Scholarship Fund

Children's Charities

Matt & Sheila Cappello "For Elise & Sam" Fund

Children's Hope Chest

Ivan & Mildred Burks Fund

Church Musicians

Jeanne Russell Williams Memorial
Endowment Fund

Clergy and Laity Education

Bishop Robert & Thelma Goodrich
Memorial Trust

Nancy McMullin Permanent Endowment Fund
Ordinands Education & Spritual Growth Fund

Clergy Support

Anonymous Memorial Trust
Clergy & Clergy Family Emergency
Endowment Fund
Gladys Hovis Clergy Retiree Housing Fund

Clever UMC

Arlie & Laura Little Memorial Trust

Coldwater United Methodist Cemetery

Albert M & Flora Fulton Coldwater
Cemetery Trust

Thompson R Fulton & Rose Fulton Cramer
Memorial Trust

Albert & Angeline Costner/J Frederick
Fulton & Minnie Costner Fulton Memorial
Perpetual Fund

Community UMC-Columbia

John & Miriam McClure Memorial Trust
Edna M Burch Memorial Fund

Community UMC UMW-Columbia

Miriam McClure Memorial Scholarship

Country Club UMC-Kansas City

Dr & Mrs J H Hewlett Memorial
Endowment Fund

Tom & Phyllis Wheatley Memorial
Endowment Fund

Designated Funds Con't

Cuba UMC

Apportionment Endowment Fund
Scholarship Endowment Fund

Epworth Family Services

The Norman & Eureath Schoeppel Memorial
Endowment Fund
James & Elizabeth Hertzler Permanent
Endowment Fund
Henry F & Roberta H Niemann Memorial Fund
Rev. David W Richardson Memorial
Endowment Fund

Fairfax UMC

Pauline Arnold Scholarship Fund

Foundation Ministry Grants

Anonymous Memorial Trust
William E Baker Permanent Trust Fund
Charles Cecil & Joy Dean Bush Memorial Fund
Franklin & Louise Cole Unrestricted Fund
Directors Permanent Endowment Fund
Helen Gibbs Memorial Fund
Alexander & Gilbreath Endowment Fund
Chance Harp Memorial Fund
Ethel K Hayward Memorial Endowment Fund
Robert & Geraldine de Jong Memorial
Unrestricted Fund
Reverend Keith & Barbara Maxwell
Memorial Trust
Betty Kishpaugh Memorial Fund
Anderson/Klosterman Charitable Memorial Trust
Lloyd & Adena McKemey Endowment Fund
Bates Lohman Memorial Fund
C Ben & Dymple Medlen Memorial Fund
Celeste S Menees Endowment Fund
Merrydelle G May Perpetual Memorial Fund
Vernon & Allie Meyer Unrestricted
Memorial Fund
Calvin & Mary Moore Memorial Trust
Paul L & Helen Shuck Ross Memorial Trust
Rogers & Mirian Wohlberg Memorial Fund
Rev Theodore H Wolff Administrative
Memorial Trust
Gerald E Yardley Memorial Endowment Fund

Foundation New Church Development Grants

Anonymous Memorial Trust
Rev Charles & Bernice Miller New Church
Development Trust

Foundation College Scholarships

Clint & Marge Hawkins Memorial Christian
Education Trust
Merrydelle G May Perpetual Memorial Fund
Judge Leah B McCartney Scholarship Fund
Mary Alice Reinhardt Memorial
Scholarship Fund

Foundation Seminary Scholarships

Bert Bolin Seminary Scholarship Trust
Selma Borgeson Seminary Scholarship Fund
Oscar Cole Seminary Scholarship Trust
Ogle O Menees Permanent Trust
Vernon & Allie Meyer Seminary Scholarship Fund
Ray & Norma Miller Seminary Scholarship Fund
Wilbur & Mildred Miller Seminary
Scholarship Fund
Otto & Carolyn Steinhaus Seminary
Scholarship Fund
MUMF Seminary Scholarship Fund

Gateway Central/Regional Districts

Effie June Poole Memorial Trust

Green City UMC

Rev Orville & Tessie Shriver Memorial Fund

Hannibal First UMC

Clarence B & L Courtney McOwan
Memorial Fund
McOwan, Young & Northcutt Memorial Fund
Arthur & Pansy Young Permanent Trust

Huffman Memorial UMC

The DeShon Family Endowment Fund

Instituto Uniao de Uruguaiana da Igreja Metodista

Williams Family Permanent Trust

Kimberling City UMC

Robert & Nina M Campbell Memorial Endowment

Kingswood Manor

Pearle Davis Memorial Fund

Knox City UMC

Charles C & Mary A Croy Endowment Trust

LaPlata UMC

Vera Gillet Permanent Trust
Paul L Ross Permanent Trust

Leslie UMC

Matilda S Wolff Capital Maintenance Fund

Linn Memorial UMC-Fayette

Elizabeth Epple Endowment Fund

Linneus UMC

Jim & Edna M Burch Memorial Fund

Luray UMC

George Boley Memorial Fund

Manchester UMC Circle of Concern

Zack F & Kathryn L Bettis Endowment

Marquand UMC

Mabel E Dees Endowment Fund

McCurdy Ministries

The Marian L Firestone Scholarship Fund

Beacon Ridge & Wesley Mission United**Methodist Church of Southern Africa**

Bridges of Hope Scholarship Fund

Mexico UMC

John & Shirley McClure Youth Ministry
Memorial Fund

The Norman & Eureath Schoepel Memorial
Endowment Fund

Midway Locust Grove UMC

Nola D Robinson Memorial Fund

Milan UMC

Phillip M Marr Charitable Memorial Trust

Missions for Children's Hospitals

Dorothy Schellhase Permanent Endowment

Missouri UMC-Columbia

Jim Burch Memorial Fund
Fred & Rebecca Meinershagen Memorial Fund
The Norman & Eureath Schoepel Memorial
Endowment Fund

Missouri United Methodist Women

The Norman & Eureath Schoepel Memorial
Endowment Fund

MO Conference Board of Pensions

Reverend Theodore H. & Matilda Wolff
Memorial Trust

MO Conference Congregational Development

Mary Margaret Cairns Charitable Memorial Fund
Adrian & Margaret Harmon Ministry
Endowment Trust
E A Morgan Family Endowment Fund

MO Conference Fund for Area Development

Anonymous Perpetual Fund

MO Conference Camps

Gunn City UMC Endowment Fund
Robert & Geraldine Glenn Camp Scholarship
Clint & Marge Hawkins Memorial Christian
Education Trust
King Hill UMC Camp Scholarship Fund
Rev David W Richardson Memorial
Endowment Fund

MO Conference Creative Ministries Team

Albert & Angeline Costner/J. Frederick Fulton &
Minnie Costner Fulton Memorial Perpetual Fund

MO Conference Ordained Ministry Team

Hubert Bicknell Walker Fund for Ordained Ministry

MO Conference Values Team

Betty Admussen Native American Scholarship Fund

Nelson Memorial UMC – Boonville

Nelson Memorial UMC Van Fund

Nelson Memorial UMC - East Prairie

Lela Hill Scott & Arpa Hill Lewis
Memorial Fund

Normandy UMC

Leander E & Nellie R Rossel Perpetual Fund

Ohio Street UMC

Family Life Center Fund

Old Appleton Cemetery

Zion UMC of Old Appleton Cemetery
Endowment Fund

Ozarks Methodist Manor

Ogle O Menees Permanent Trust

Ozark UMC

Mildred L & James T Workman Charitable Trust

Perkins School of Theology

Clarence B & L Courtney McOwan Memorial Fund

Ravenwood UMC

Adwell Good Samaritan Fund

Rocheport UMC

Edna M Burch Memorial Fund

Saint Paul School of Theology

The Boone and Nadine T Ingels Memorial
Scholarship Fund

Scholarships

Anonymous Charitable Fund

Sedalia First UMC

N B Williams Perpetual Memorial Endowment Fund

Designated Funds Con't

Sedalia Wesley UMC

Henry F & Roberta H Niemann Memorial Fund

Sedalia Wesley UMC UMW

Henry F & Roberta H Niemann Memorial Fund

Shiloh UMC - Foristell

Jack & Evelyn Goode Educational Fund

Sikeston First UMC

Anonymous Permanent Trust

Garwood & Ruth Felker Sharp Scholarship Fund

Garwood & Ruth Felker Sharp Community
Outreach Fund

Smith Chapel-Sikeston

Ruth Felker Sharp Scholarship Fund

Smith Creek UMC

Leroy Brakemeyer Memorial Charitable Fund

Spofford – Kansas City

Ivan & Mildred Burks Fund

St. John's UMC

Alwin & Joyce Rector Donor Restricted Trust

St. Paul UMC – Springfield

Margaret Curtis Permanent Endowment Trust

St. Peter UMC-Blue Springs

Rachel House Hudson Camp Fund

Tipton UMC

The William H & Jo Ann Dinwiddie
Education Fund

Trinity UMC-Piedmont

Albert & Angeline Costner Memorial Trust
J Frederick & Minnie Costner Fulton Memorial Trust
Albert M Fulton Memorial Trust (2)
Thompson R & Laverne W Fulton Perpetual Trust
Ed & Joann Seitz Memorial Scholarship Fund
The Trinity UMC Children's Camp Fund

UMCOR

Axthelm Family UMCOR Fund

Blanche Hubbard UMCOR Endowment Trust

University UMC -St. Louis

James & Elizabeth Hertzler Permanent
Endowment Fund

University UMC UMW - St. Louis

Erma Shadle Memorial Endowment Fund

Warsaw First UMC

Gordon H Drake Charitable Memorial Trust

Watoto Child Care Ministries

Ivan & Mildred Burks Fund

Wesley UMC-Jackson

Mr & Mrs Carl Trickey Permanent Endowment Trust

Wesley Memorial UMC

Franklin & Louise Cole Memorial Fund

Wilderness Camp and Retreat Center

Janice Beadleston Permanent Endowment

Woodlandville UMC

Anonymous Education Fund

Zion UMC-St. Louis

Chris W & Shirley J Fotenos Charitable Fund

Endowment For Discipleship

Frieda Betts Perpetual Fund

Camp Jo-Ota Donor Restricted Trust

Orville & Jackie Hicks Fund

Lincoln & Margaret Malven Fund

Ralph & Martha Maxton Fund to Honor
Neil Stein

St Charles First UMC Paul & Daleva Metcalf
Memorial Fund

Bethany Mueller Fund

Charles Mueller Fund

Jacob Mueller Fund

Paul Mueller Fund

Anna Porch Fund

Daniel Porch Fund

Danielle Porch Fund

Elijah Porch Fund

Elizabeth Porch Fund

Isaac Porch Fund

Joshua Porch Fund

Kristin Porch Fund

Lauren Porch Fund

Maria Porch Fund

Norman Porch Reserve Fund

Sarah Porch Fund

Marguerite Tapy Permanent Fund

St Charles First UMC Frank & Ruth Tucker Memorial
Fund

Earl & Elinor Wipfler Permanent Fund

Earl & Elinor Wipfler Permanent Trust II

Revs Robert G & Margie M Woods
Permanent Fund

Gordonville Zion UMC Fund

Cape Girardeau South Clergy Fund

Charting a Course for Generosity

We all need a little help in making the direct connections between ministry, money, discipleship and giving—particularly when it comes to forming lasting commitments and shaping long-term behavior.

The Foundation can help you and your church make these connections.

Resources include:

- Consultation with your boards and committees
- Free brochures on various gift topics
- Free workshops on basic estate planning & ways to give
- Free consultations with individual donors
- Help creating an endowment program
- Free material for newsletters
- Help investing and administering long term funds and endowments
- Processing gifts of stock

Make sure your congregation is aware of, and understands how easy it is to:

- Give a gift of appreciated stock
- Create a gift annuity
- Give a percentage of an IRA
- Name the church as a beneficiary of a life insurance policy
- Make a gift through a will or trust
- Create an endowment for a favorite ministry
- Create a Donor Advised Fund

And the list can go on to include gifts of land, farm products (crops or livestock), a retained life estate on one's home, a charitable remainder trust or charitable lead trust. Suffice it to say that a check in the offering plate is not the only way to give!

Contact the Foundation at any time just to ask a question, request information or to arrange a personal visit.

Call 800-332-8238 or visit the website at www.mumf.org.

2013: The Year of the Estate Plan

After years of uncertainty, Congress has finally clarified (at least for now) some of the rules that impact estate plans. Consequently, many folks are now meeting with their attorneys and CPAs to amend and revisit plans.

Make sure your church is part of the conversation. The Foundation can provide information, materials and programs to help remind the members of your congregation that your church is a great place to leave a legacy.

The Foundation website, www.mumf.org, now includes an entire section devoted to planning wills and estates. Call us at 800-332-8238 to discuss how you can plant seeds in 2013 that will bear fruit for years to come.

www.mumf.org

Ministry Grants

Spring 2012

Asbury UMC St. Louis - \$2,000 for the expansion of the youth outreach ministry and the purchase of new A/V equipment

Central Methodist University- \$30,000 to be used as salary for ministry and student internships, support for US-2 missionary and funding for campus mission trips

Concord Trinity UMC St. Louis- \$1,600 to help improve church security

Diamond UMC - \$3,955 for upgrades to the church sound system

Elevation Church Fenton- \$3,700 challenge grant for the purchase of A/V equipment

First UMC Sikeston - \$5,000 for costs associated with the organizing of Hope Epidemic and Hope Fest

Grace UMC Cape Girardeau- \$5,000 to help install a new electronic sign

Grace UMC Greenville - \$4,000 to make the existing restrooms handicap accessible and upgrade kitchen appliances

Grace UMC Lee's Summit- \$5,000.00 to help with the construction of a new, Leadership in Energy and Environmental Design certified sanctuary



Above: Dexter First United Methodist Church received a Spring 2011 grant to remodel their childrens' education wing. They were able to paint, add decor, and install new carpet.

Grace UMC St. Louis - \$1,000 for expenses related to leadership retreats

Grace UMC Springfield - \$5,000 to help provide Wednesday Night Dinner for food insecure individuals

Herculaneum UMC - \$2,000 to help launch a youth Ministry

Hood UMC Republic - \$5,000 for upgrades to the kitchen, laundry, and communications areas of the church

Laclede UMC - \$2,000 for the purchase of A/V equipment and a digital piano

Missouri Conference – Center for Congregational Excellence - \$25,000 to launch a marketing campaign for new church starts in Springfield and St. Joseph

Missouri Conference – Mozambique Initiative- \$5,000 for new computers, printers, a digital camera and TV

Newhouse Kansas City - \$2,500 for the purchase of new cribs, crib mattresses, and bedding sets

Oakland UMC Buckner - \$1,000 to help complete improvements to the entryway of the church

Open Hearts Church Wright City - \$2,000 challenge grant for the purchase and installation of new A/V equipment

Pacific UMC - \$3,500 challenge grant for new A/V equipment

Renaissance UMC Kansas City - \$2,500 for new A/V equipment

Shalom House - \$2,500 for costs related to upgrading their computer lab

SunRise UMC O' Fallon - \$4,000 for the purchase of a covered storage trailer

Trinity UMC Moberly - \$5,000 challenge grant for new A/V equipment

Trinity UMC Piedmont - \$5,000 for technology upgrades in the children and youth classrooms

Union UMC - \$3,000 to help fund updates for Young Adult and Children's Programming

University UMC St. Louis - \$3,000 for new computers and computer software

UMC of the Shepherd - \$2,000 for technology updates to the Children's Check-in/Communication and to the children's classrooms

Wilkes Boulevard UMC Columbia- \$5,000 for new A/V equipment

Woodlandville UMC Rocheport \$5,000 matching grant for the purchase of a new church sign

**Brashear UMC/
Hurdland UMC/
Sabbath Home** - \$1,300 for portable A/V equipment

Broadway UMC Kansas City- \$4,000 to help with costs to rebrand the church, Keystone United Methodist Church

Campbell UMC Springfield- \$5,000 for the purchase and installation of security cameras

Ebenezer I UMC Springfield- \$4,500 for new A/V equipment

Gambrill Gardens St. Louis - \$5,000 for a computerized personal emergency system

Harper Chapel UMC Osage Beach - \$5,000 for A/V equipment and costs associated with starting a new service

Kingdom House - St. Louis \$6,000 to fund the salary of a Curriculum Consultant/Writer

Marble Hill UMC - \$1,000 to help purchase assistive hearing devices, presentation software, and for costs associated with updating the church website

New Covenant UMC - St. Louis - \$5,000 for A/V equipment and to carpet the stage area

New McKendree UMC Jackson - \$5,000 for A/V equipment

New Salem UMC Oak Ridge - \$5,000 for A/V equipment

Pathways UMC Alba - \$6,000 challenge grant for the purchase of a van

Pathways UMC Springfield - \$2,800 for the installation of a washer and dryer at the Safe to Sleep Women's Night Shelter

Princeton UMC - \$3,000 for shelves, racks, and a washer and dryer set to benefit the Princeton UMC Thrift Shop

St. Peter UMC Blue Springs - \$5,000 for A/V equipment

The Connection UMC St. Louis - \$5,000 for A/V equipment

Wentzville UMC - \$4,000 for A/V equipment

Weston UMC - \$4,000 for A/V equipment

Fall 2012



Above: First United Methodist Church of West Plains received a Spring 2011 grant used to fund a summer intern to help their children and youth programs.

Grant Feedback

We are always seeking to make the grant program more effective. Here are some of the comments we have gathered lately:

“At the time we applied for and received the grant, there were no funds available in the budget for a worship leader. We knew that our Journey service needed to be ramped up, with a focus on excellence, if it was to continue to grow.... We are very grateful to the Foundation for the grant, believing that it has been one of the turning points in helping us continue to work toward our mission of leading people in new life with Jesus.

-First United Methodist Church of Sikeston

“The sign created lots of conversation, 98% favorable. We have been able to verify that persons have attended events at the church because they saw the info on the sign. What we did not anticipate is that people would pull into the parking lot to read all the info displayed on it.”

-Smith Chapel United Methodist Church

“We only became aware of the grant program about three years ago. Knowing that grant funds are available can make all the difference in presenting the project to the congregation...”

-First United Methodist Church of Glasgow

“We were able to hire an intern for last summer to help with Vacation Bible School and Kids Church... With their assistance we were able to continue Kid’s Church throughout the summer and only missed one Sunday night of youth programs... This resulted in stability and continuity within the programs through the summer.”

-First United Methodist Church of West Plains

“We wish to thank the Missouri United Methodist Foundation again for getting the ball rolling on this project. Many members of our congregation were not aware of the MUMF and the good work you do. Without the ‘seed money’ of your matching grant our congregation would have had a harder time getting the project off the ground, but when our folks became aware of your generous gift they responded enthusiastically to the challenge. God bless you and your ministry of empowerment.”

-Independence First United Methodist Church

For more information about our grant program visit our website www.mumf.org, or call 800-332-8238.



Stock & Mutual Fund Gifts

A gift of appreciated marketable securities is a wonderful – and cost-effective – way to make a gift to your church or another favorite charity. The Foundation makes it easy – with simple instructions and fast processing.

Total Stock Gifts processed in 2012
\$603,572

For example, Mary decides to complete her pledge to the Wesley UM Church this year with a gift of 100 shares of appreciated ABC Corporation stock that is held in her brokerage account. She simply completes the simple transfer form (available from the Foundation), gives it to her broker and faxes a copy to the Foundation. The broker transfers the stock electronically to the Foundation account. The Foundation liquidates the stock (cost is usually less than \$10), sends a gift receipt letter to Mary, and sends the proceeds check and a full accounting to the Wesley UMC.

It is that easy. This is a service provided by the Foundation for all Missouri UM churches and related ministries. The only cost is the liquidation fee. There are no additional costs or fees added by the Foundation.

Information, including the transfer form, is available on the Foundation website www.mumf.org, or call us at 800-332-8238.

Charitable Remainder Trusts 2012

(Unitrust & Annuity Trusts)

Charitable Remainder Trusts provide income payments and tax savings to the donor(s) and/or other named persons. When terminated, the following trusts will benefit the charitable beneficiaries listed in bold.

Central Methodist University

Wayne & Nancee Byington

Edie A. Criner

Donald A. Davis, Sr.

Robert Rogers

Clever UMC

Mrs. Clejo King

Endowment for Discipleship

(New Churches)

Earl J. Wipfler, Sr.

Epworth Family Services

Mrs. Marleah Strominger

Foundation

Gene & Sydney Ann Atkins

Mrs. Audrey Lytle

M. Leo Shumaker

Mrs. Althea Smithers

Multiple Beneficiaries

Mrs. Eve Spencer

Salem-in-Ladue UMC

Hans Fischer

St. Johns UMC-Kansas City

Alwin Rector

Zion UMC-St. Louis

Mrs. Althea Smithers

Ways to Use a Charitable Remainder Trust

A Charitable Remainder Trust (CRT) provides income to you or other designated person(s) for life or for a specific term of years. The remainder value of the trust benefits the church or charity(ies) you designate.

For maximum tax advantage, a CRT is usually funded with highly appreciated property that has a value over \$50,000. The Foundation will serve as trustee for any CRT that substantially benefits one or more United Methodist charities. As trustee, the Foundation oversees investment of the trust, payment of income and preparation of annual tax reporting information.

- Consider funding a CRT with highly appreciated real estate. The trustee sells the property and reinvests the full proceeds (no capital gains tax due). The result can be a generous tax deduction, avoidance of capital gain tax, and the creation of a new income stream.
- Consider making a testamentary gift of a portion of your IRA into a CRT. This can save taxes, generate an income for loved ones, and make a meaningful gift.
- The wealth replacement trust arrangement. Fund a CRT with highly appreciated assets. Create a second trust that purchases a life insurance policy on you with a death benefit similar to the amount placed in the CRT. Use the CRT income to fund the life insurance premium payments in the second trust. The beneficiaries of the second trust are your children. Properly structured, the result is a charitable gift and the tax-free transfer of a similar amount to your heirs.

You must have your own attorney create your CRT. The Foundation can be a source of information and assistance for you and your professional legal counsel.

Please contact us at 800-332-8238.

IRA Gifts Are Back!

Congress has renewed the legislation for 2013 that allows direct gifts from Individual Retirement Accounts (IRAs) directly to charity. (Yes – your church is a public charity.)

This opportunity is available to anyone age 70 ½ or older (...that's the age when minimum annual distributions from IRAs must begin). It can be a very useful way for some folks to make a gift to the church – up to \$100,000 per person. The gift counts as part of the required distribution, but does NOT count as income to the giver.

Sample letters and informational materials are available on the Foundation website www.mumf.org or just call us at 800-332-8238.

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