



MISSOURI UNITED METHODIST

**FOUNDATION**

**2016 ANNUAL REVIEW**





**At that moment heaven was opened, and he saw the Spirit of God descending like a dove and alighting on him.**

-Matthew 3:16 (NIV)

**...but those who hope in the LORD will renew their strength. They will soar on wings like eagles...**

-Isaiah 40:31 (NIV)

“We’re flying!” gushed the boy glued to the window as the Boeing 737 left the ground angling skyward. The other passengers were silent, some sleeping, some reading – a few window shades were closed completely. If others were secretly as thrilled as the boy, their joy (or terror) was discretely contained.

It is strange, as the years roll by, how we tend to lose our unbridled youthful enthusiasm – taking familiar things for granted. In his book, *The Wright Brothers*, author David McCullough reminds us just how extraordinary were those early days of the last century when two brothers, sons of a United Brethren pastor, at last fulfilled one of the oldest and deepest longings of humanity – to take flight with the birds of the air.

A bird in flight remains one of the wonders of creation and a profound metaphor. From biblical times to the present day, that fleet image of feather and life moving between earth and sky has symbolized the Spirit of God, the individual human spirit, and many of those most important feelings and aspirations that stir our souls.

The imagery that animates this 2016 Annual Review is meant to evoke the transcendent spirits of generous brothers and sisters in the faith whose actions set ministry in motion. An estate plan becomes an endowment, that becomes a scholarship, that educates a new pastor, that starts a new church, that shares the Good News, that brings hope to a soul, which rises in service to the Living Lord “on wings like eagles.”

The final scene in McCullough’s book describes a celebration day in Dayton, Ohio, after the Wright brothers’ invention had won worldwide acclaim. On a beautiful spring day, after flying their plane around the practice field to the delight of a large crowd, Orville gave his father, now a United Brethren bishop, his first flight:

*“They took off, soaring over Huffman Prairie at about 350 feet for a good six minutes, during which the Bishop’s only words were, ‘Higher, Orville, higher!’”*

This Annual Review bears testimony to God’s Spirit at work in the world. These pages may even offer a kind of window on more distant horizons filled with possibility – enjoy the flight!

Yours in Service,

David P. Atkins

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# SPRING MINISTRY GRANTS

**Aldrich UMC-** \$2,500 *challenge grant* for new projectors in the sanctuary

**Arch UMC- Hannibal-** \$2,500 *challenge grant* for new A/V equipment

**Arlington/La Trinidad UMC- St.Louis-** \$1,000 for community outreach programs

**Asbury UMC- Springfield-** \$1,500 to upgrade the phone system

**Billings UMC-** \$2,500 to purchase a church van for transporting children to after-school programs

**Buffalo UMC-** \$2,500 *challenge grant* for new A/V equipment

**Central Community UMC- Shell Knob-** \$5,000 *challenge grant* for a wireless fire alarm system

**Clarence UMC-** \$2,500 *challenge grant* for new A/V equipment

**Community UMC- Columbia-** \$5,000 to install a lighting system in the sanctuary

**Elevation Church- Fenton-** \$2,500 *challenge grant* to create a video studio

**Elsberry UMC-** \$5,000 to finish the church basement for children's Sunday School classrooms

**Gashland UMC- Kansas City-** \$1,000 to support a summer book drive for local elementary school students

**Hallsville UMC-** \$2,500 *challenge grant* for new A/V equipment

**Holcomb UMC-** \$2,500 *challenge grant* for new A/V equipment

**HomeFirst STL/Lafayette Park UMC- St. Louis-** \$3,000 to purchase apartment “Starter Kits” for previously homeless residents

**Hope UMC- Lone Jack-** \$2,500 *challenge grant* for new A/V equipment

**Lafayette Park UMC- St. Louis-** \$5,000 for supplies used by “FreshStart STL”

**Linn Memorial UMC- Fayette-** \$2,200 to create a mobile welcome center and community space in the front entrance

**Lydia Patterson Institute-** \$10,000 for tablets and SmartBoards to upgrade classroom learning environments

**Manchester UMC-** \$1,000 to build a chicken coop and fence in the Kingdom House neighborhood community garden

**Missouri Conference- Pastoral & Congregational Excellence-** \$100,000 to help support training for new clergy through the Ministry Fellowship Program

**Morrisville UMC-** \$2,500 *challenge grant* for new projectors in the sanctuary

**Mount Vernon First UMC-** \$1,000 to provide supplies for a school backpack program

**Neosho UMC-** \$2,500 to install an LED marquee

**Odessa First UMC-** \$5,000 *challenge grant* to install an elevator/lift system

**Parnell UMC-** \$5,000 to install a chair lift

**Perryville UMC-** \$2,500 *challenge grant* to expand the “ILLUMINATIONS Ministry”

**Potosi UMC-** \$1,500 for new air conditioning units

**Princeton UMC-** \$2,500 *challenge grant* for new A/V equipment

**Puxico First UMC-** \$2,500 *challenge grant* for an LED marquee

**Richland UMC-** \$2,500 *challenge grant* for new A/V equipment

**Saint Paul School of Theology- Kansas City area-** \$6,000 to help support new ministries through the SPST Missouri Fellows Program

**Scott’s Chapel UMC- Hannibal-** \$2,650 for a new church roof

**Sikeston First UMC-** \$2,500 *challenge grant* for new A/V equipment

**Sisters in Faith- Pleasant Grove UMC-** \$5,000 to sponsor an “Eagle Lake on Location” summer camp

**St. Luke UMC- Columbia-** \$4,300 to upgrade church kitchen facilities

**St. Luke’s UMC- Kansas City-** \$2,000 *challenge grant* for community outreach activities

**St. Stephen UMC- Troy-** \$5,000 to start a new worship service

**Sturgeon UMC-** \$2,000 to provide handicap accessibility to the church

**UMC of Kimberling City-** \$2,500 *challenge grant* for a safety & security improvement project

**Wentzville UMC-** \$2,500 for new A/V equipment

**Wesley UMC- Jefferson City-** \$3,750 to purchase supplies for their community garden

# FALL MINISTRY GRANTS

**Ashland UMC-** \$1,000 *challenge grant* to purchase a camcorder for the video ministry

**Aurora UMC-** \$1,258 for new A/V equipment and improved lighting

**Centennial UMC-** \$2,500 for new A/V equipment

**Central UMC- Webb City-** \$2,500 *challenge grant* for new A/V equipment in order to live stream sermons

**Clarksville UMC-** \$2,500 to refurbish stained glass windows

**Court Street UMC- Fulton-** \$2,500 *challenge grant* to provide Wi-Fi access

**Excelsior Springs First UMC-** \$1,500 to purchase projectors and diapers for the Mighty Diapers program

**Good Shepherd UMC- Gladstone-** \$2,500 for new A/V equipment

**Good Shepherd UMC- Gladstone-** \$2,500 for a new roof on the building used by A Turning Point

**Hannibal First UMC-** \$2,500 *challenge grant* for new A/V equipment

**Herculaneum UMC-** \$1,500 *challenge grant* to improve children's classrooms

**Huffman UMC- St. Joseph-** \$2,500 to update restroom to ADA standards and add lighting in preschool area

**Kearney First UMC-** \$2,500 for new A/V equipment

**Kennett First UMC-** \$2,500 for new A/V equipment and LED sign

**Kingdom House-** \$3,500 to help fund the Urban Forum program

**Lincoln UMC-** \$2,060 to pay 2017 summer camp fees for The Stand, a student ministry

**Missouri Conference - Mission, Service and Justice Ministries-** \$1,000 to help support the Bike to the Future program

**Neosho UMC-** \$2,500 *challenge grant* for new A/V equipment

**New Hope UMC- Clark-** \$1,500 *challenge grant* for new A/V equipment

**New McKendree UMC- Jackson-** \$1,000 *challenge grant* for playground equipment to be used by children with physical or developmental needs

**New Salem UMC-** \$2,500 *challenge grant* to pave parking lot for handicap accessible parking and improve existing ramps

**North Cross UMC- Kansas City-** \$2,500 for new A/V equipment



Kingdom House  
Urban Forum

**Saint Paul School of Theology- Kansas City area** - \$1,000 to help fund The Upper Room Academy for Spiritual Formation

**Savannah UMC**- \$2,500 for new A/V equipment and chairs

**St. Charles First UMC**- \$2,500 for new A/V equipment

**Stockton UMC**- \$550 to purchase a flat screen TV for Kidz Connection

**Wesley UMC - The Downtown Church- Springfield**- \$5,000 to create an outdoor area with an awning, seating, and planters

**Wesley UMC - Sikeston**- \$1,000 challenge grant to resurface and improve parking lot

**Wilkes Boulevard UMC- Columbia**- \$3,600 to help fund Phase 2 of the Client Incentive Program for Turning Point Day Center

**Woods Chapel UMC- Lee's Summit**- \$2,500 for new A/V equipment

**Woods Chapel UMC - Blue Springs Campus**- \$2,500 challenge grant for an LED sign

**Yarrow UMC- Kirksville**- \$1,000 challenge grant to install a permanent handicap ramp at the main entrance

# FELLOWSHIPS DEVELOP NEW LEADERS, NEW MINISTRIES

FOUNDATION PARTNERS WITH CONFERENCE & LOCAL CHURCHES



**Peter Norton**  
Associate Pastor at First  
UMC in St. Charles

“During the first year of my Fellowship experience I have deepened in my calling to be a pastoral leader within the church,” states Peter Norton, a participant in the new Missouri Conference Fellows program. A similar sentiment is echoed by Fellow Jennifer Moxley, “My personal sense of mission has increased as I have seen what it looks like—day in and day out—to make disciples of Jesus Christ for the transformation of the world.”

Peter and Jennifer are serving as associate pastors at First UMC St. Charles and First UMC Sikeston, respectively. A third Fellow, Chris Abel, served at The Gathering in St. Louis. Chris led the start-up of the new Webster Groves campus of The Gathering and agrees that the Missouri Fellows program “can be a powerful tool to help young clergy be identified and nurtured into roles and churches they would have otherwise not had the opportunities to serve.”

The Fellows program is the result of a partnership between the Center for Pastoral Excellence, the Foundation, and the local host congregations. As Reverend Karen Hayden, Director of the Center states, “The program seeks to place individuals in a mentored, collaborative environment for their pastoral ministry development.” She adds that, “Following their Fellowship, participants will be prepared to lead in Missouri’s new church plants or significant congregations.”

About 85% of the salary and benefits package for each Fellow is paid equally by the Conference and the Foundation. The remainder is paid by the host congregation. “This is a significant financial commitment to develop high-capacity leaders for new and existing churches in Missouri,” states Foundation executive director, David Atkins.

In 2016 another Fellow, Katrina Drew, was appointed to serve Salem in Ladue UMC. Two additional Fellows will be appointed in 2017.

“The combined financial commitment of the Conference and Foundation in 2017 will be about a quarter of a million dollars,” states Atkins. “This program demonstrates how endowment funding can really amplify the impact of traditional apportionment funding.”

Congregations and individuals who wish to become involved with the Fellows program should contact the Center for Pastoral Excellence. If you would like to support the Fellows program with a financial gift, please contact the Foundation.



**Katrina Drew**  
Pastor of Urban Ministry  
at Salem in Ladue UMC  
in St. Louis

# 2016 FAST FACTS

**\$90,989,296**

Total assets under management

**\$60,033,046**

Market value of investment accounts owned by 185 Missouri United Methodist churches and 33 UM institutions & agencies

**\$2,911,610**

Dollars withdrawn by churches or agencies for use in ministry

**\$5,908,286**

New dollars contributed by donors to permanent funds or deposited by churches and UM institutions into investment accounts

**\$4,634,684**

Market value of all gift annuities and charitable remainder trusts under administration

**\$355,258**

Annuity or unitrust income payments made to individuals

**\$834,724**

Proceeds to UM churches and institutions processed through the Foundation's Stock Gift Pass Through program

**\$739,142**

Grants distributed to churches and related ministries

**\$76,000**

College scholarships awarded to United Methodist undergraduate students

**\$68,500**

Seminary scholarships for Missouri ministry candidates



# CLERGY AND CHURCH FINANCIAL MINISTRY

## What is C2FM, the Clergy and Church Financial Ministry?

C2FM is a program to help clergy and laity build better financial skills both professionally and personally through education, training, and coaching.

Pastors may apply for direct financial aid to complement their personal planning and training efforts. In turn, the program inspires and supports the building of financial ministries within a pastor's congregation, and outreach into the community.

### ***Financial Literacy Educational Opportunities:*** ***Benefits of the Program:***

Educational events for pastors, seminarians, spouses and lay leaders include topics such as:

- Personal stewardship, budgeting, theology of money and dealing with debt
- Congregational financial identity, budgeting and stewardship, and the congregation as an employer
- Financial courses: Savings strategies, ministerial taxes, family and personal care, retirement and financial planning

- Helps pastors be more effective in their ministry
- Benefits congregations by having more effective leadership and less turnover
- Benefits the church by having pastoral leaders who are more engaged
- Enhances the relationship between seminaries, and the students in or considering enrolling in seminaries
- Enhances long-term participation in pension fund programs

### ***Direct Aid:***

- Incentives for clergy to take part in personal finance education
- Low- or no-cost financial planning and counseling
- Contributions for pastors and congregations that enroll in pension savings programs
- Help for pastors to create emergency funds
- Strategies that help pastors pay down or eliminate educational debt
- Scholarships so that seminarians borrow less while in school



Chris Bouchard is the Director for the Missouri United Methodist Foundation's Clergy and Church Financial Ministry (C2FM), which is funded by a grant from the Lilly Endowment, Inc.

The purpose of the C2FM is to better equip clergy and churches to effectively lead congregations in order to increase the health, vitality, and effectiveness of their ministries. The purposes of the grant are to:

1. Assist in developing new or strengthening existing programs to reduce or alleviate some of the key financial pressures that inhibit effective pastoral leadership
2. Improve the financial literacy and management skills of pastoral leaders through educational programs and other efforts to increase their ability to provide capable fiscal leadership for their churches and ministries under their care

Chris comes to us from the Missouri Small Business and Technology Development Center (SBTDC) where he worked for 24 years and most recently was the state director. He has a great deal of experience in helping small business owners improve their financial and management knowledge to improve the vitality of their operations. Services of the SBTDC include one-on-one consultations as well as educational workshops. Chris was also a member of the Missouri Air National Guard where he held positions of financial management officer, budget officer and comptroller of the Lambert Air National Guard unit.

Chris is a member of the First Presbyterian Church in Columbia, where he is an Elder. Over the years, he has served on the session, board of trustees and deacons. He also facilitates Dave Ramsey's Financial Peace University programs at his church.

## DOUBLE YOUR DOLLARS

The C2FM effort is possible thanks to a generous grant from the Lilly Endowment.

\$500,000 must be raised to receive additional matching funds from Lilly. That means every donation will be doubled with new grant dollars.

Your gift in support of this effort will make a BIG difference in the life of our Church.

Double your gift dollars and impact by:

- Writing a check
- Using your credit card at [www.mumf.org](http://www.mumf.org)
- Transferring a gift of stock or mutual fund shares
- Giving a gift of personal property, real estate, or other assets

### Double your gift today:

Mail: Missouri United Methodist Foundation  
Attn: C2FM  
PO Box 1076  
Columbia MO 65205  
Tel: 800-332-8238  
Web: [www.mumf.org](http://www.mumf.org)  
Email: [foundation@mumf.org](mailto:foundation@mumf.org)

C2FM, Director  
Chris Bouchard  
[cbouchard@mumf.org](mailto:cbouchard@mumf.org)  
or call 573-268-4440

# 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.

**Asbury UMC-Kansas City**

Maxine Zeckser

**Avondale UMC-Kansas City**

Margery Kuhler (7)

**Blue Springs First UMC**

John & Katherine Rosendahl

**Bolivar UMC**

Frank & Rita Terhune

**Campbell UMC-Springfield**

Frances M. Lampe

**Central Methodist University**

Raymond & Catherine Carnes

Donald A. Davis (2)

Robert L. & Velma F. Felt

Treva S. Hall

**Christ UMC-Independence**

James & Juanita Knight

**Church of the Shepherd -**

**St. Peters**

Anonymous

**Cornerstone UMC-O'Fallon**

Frank Davis (2)

**Country Club UMC-**

**Kansas City**

Edward C. & Mary Ellen  
Olsson

Jeannette Ragan

John & Errett Schmid

**Epworth Children &  
Family Services-St. Louis**

Jack Adams

Bernice Chastain

Evelyn Donnell

Carl & Shirley Garrett

Ann Johanson (2)

Guy & Joan Johnson

Betty A. Melby

Evelyn Terrall

**Foundation**

Anonymous

M. Eileen Crabtree

Robert L. & Velma F. Felt

Byron Gilbreath

Warren & Mary Ellen Meyer

Lois Mondy

Elizabeth Nace

**Gambrill Gardens-St. Louis**

Ted G. Matkin

Valeria Murray (2)

**Gashland UMC-Kansas City**

Margery Kuhler

**Glasgow UMC**

James & Claire Matthews

**Hannibal First UMC**

Anonymous (2)

Donna J. Setterberg (2)

**King's Way UMC-  
Springfield**

William & Joyce Clark (2)

Rita A. Cook

**King's Way UMC**

**Mission Endowment**

Ruth Ann Auner

**Kingdom House-St. Louis**

Anonymous (3)

Jack Adams

Ted G. Matkin (2)

Glenna Mae McClain

Mary Ellen Meyer

**Kingswood Foundation-**

**Kansas City**

Howard Jeter

**Kirkwood UMC**

Evelyn Terrall

Deane & Fancine Thompson

**Lincoln UMC**

Juanita M. Hovendick

**Manchester UMC**

Anonymous (2)

Allie Garrison (2)

Richard Vreeland

**Maysville UMC**

Noma Vaughn

**MO Conference  
Congregational**

**Development**

Virginia Ruth Bronson

Lois Windsor (3)

**Missouri UMC-Columbia**

Judy Parsons

**Mt. Zion UMC-St. Louis**

Ted Matkin (7)

**Newhouse-Kansas City**

Dortha Mae Olsen

**North Kansas City First UMC**

Wanda Ebert

Marion Gentry

Mary Lou Gentry

Ione McIntyre

**Oregon UMC**

Elizabeth Waller (2)

**Ozarks Methodist Manor -**

**Marionville**

Cecil Ferguson

Betty Frederick

**Pathways UMC-Springfield**

Anonymous

**Platte Woods UMC**

Wanda Weisz

**Poplar Bluff First UMC**  
Jerry & Ernestine Arnold

**Potosi UMC**  
Rose Mary Elliot  
Glenna Mae McClain

**Richmond UMC**  
Anonymous

**Rolla First UMC**  
Gerald Huddleson (3)

**Saint Paul School of Theology**  
Mike & Karen Farrell  
Sally Firestone (3)  
Gary Harms  
Cleo Kottwitz  
Ruth Nothdurft  
Isabelle Sauer  
Margaret Sonnenday  
Walter Wilkening

**Shepherd's Center-St. Louis**  
Richard Vreeland

**Siloam Chapel  
Cemetery Association**  
James & Claire Matthews

**Spofford-Kansas City**  
Margery Kuhler  
Maxine Zeckser

**Spofford Foundation -  
Kansas City**  
Clifford & Mary Beth Seger

**St. Luke's UMC-Kansas City**  
M. Eileen Crabtree

**St. Mark's UMC-Florissant**  
Anonymous

**St. Stephen UMC-Troy**  
Faye Pavelka

**Stoutland UMC**  
James & Juanita Knight

**Tennessee Wesleyan College**  
Anonymous

**Trinity UMC-Piedmont**  
Anonymous

**UMCOR**  
Anonymous (2)  
Byron Gilbreath  
Gerald Huddleson (3)  
Joe & Janet Laws

**University UMC-St. Louis**  
Betty A. Melby

**Webster Hills UMC**  
Lloyd & Betty Watkins (2)

**Windsor UMC**  
Lela Baskins

**Windsor UMC UMW**  
Lela Baskins

**Zion UMC - Gordonville**  
Anonymous



## LOVE AND... GIFT ANNUITIES

On paper, Deane and Fancine Thompson might not seem to have a lot in common. She grew up in University City in St. Louis; he grew up on a farm in Indiana. He is an engineer and number-cruncher by training; she is a creative designer and seller of jewelry. She is Jewish, and he is United Methodist.

Together, however, they are a dynamic partnership with deeply shared values of love, family, service, and generosity.

They remain active and supportive of each other's faith communities in St. Louis, and that includes the use of a planned gift arrangement that will ultimately benefit Kirkwood United Methodist Church.

"Back in 2007, our investment advisors suggested we needed more fixed income in our retirement plan," explains Deane. "They suggested an income annuity, but at about the same time we learned about charitable gift annuities, and our advisors encouraged us to pursue that option also."

"In addition to providing us a steady stream of income with tax advantages, we also wanted to give to Kirkwood United Methodist Church and United Hebrew Congregation," states Deane. The Thompsons then worked with the Missouri United Methodist Foundation and the United Hebrew Congregation to create two identical gift annuities – one for Deane benefiting his church and one for Fancine benefiting her synagogue.

"We didn't know in 2007 that a financial crisis would come in 2008, but our timing was fortunate," explains Deane. "Funds we held personally were vulnerable to the downturn, but the funds put into the annuities were safe. The quarterly payments we receive are a valuable and reliable part of our retirement income."

And so, the talents multiply and blessings abound. To learn more about creating your own gift annuity for your favorite ministry, contact the Foundation at 800-332-8238.

# 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 -  
Wilmore, KY**

Missouri Asbury Alumni Association  
Scholarship Fund

**Auxvasse Municipal Cemetery**

Auxvasse UMC Perpetual Cemetery  
Care Fund

**Avondale UMC - Kansas City**

Lloyd & Adena McKemey Memorial Fund

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

Bridges of Hope Scholarship Fund

**Belgrade UMC**

Belgrade UMC Scholarship Fund

**Blue Springs First UMC**

Inez Dexheimer Scholarship Fund

**Bolivar UMC**

Dunnegan Memorial Permanent Trust

**Broadway / Keystone UMC - Kansas City**

James & Marjory Mordy Charitable Fund

**Brock UMC Cemetery - Memphis**

Lawrence Family Memorial Endowment

**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

**Central Methodist University - Fayette**

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 Hope Chest -**

**Colorado Springs, CO**  
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 & Spiritual  
Growth Fund

**Clergy Support**

George Clinton Memorial Trust  
Clergy & Clergy Family Emergency  
Endowment Fund

Gladys Hovis Clergy Retiree  
Housing Fund

**Clever UMC**

Archie & 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**

Edna M. Burch Memorial Fund  
John & Miriam McClure Memorial Trust

**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

**Cuba UMC**

Apportionment Endowment Fund  
General Endowment Fund

Scholarship Endowment Fund

**Della Lamb Neighborhood House -  
Kansas City**

William & Blanche Simmer  
Endowment Fund

**Donor Advised**

Eugene L. & Sarah G. Lowry  
Charitable Fund

# THE IVAN & MILDRED BURKS MEMORIAL ENDOWMENT FUND

“They both were good people who loved God and helped in the community. They gave my brother and me love, a faith in God, and an example of how to live life to its fullest. They gave their money to help the world both through their church and other charities. They are people who deserve to be honored,” states Reverend Donna Burks Hoover as she describes the memorial endowment fund that she and her brother, Bob Burks, created at the Foundation in memory of their parents.

Members of the Mt. Washington United Methodist Church for 50 years, Ivan and Mildred Burks built a life around faith, family, friends and service to those in need. They retired to Lee’s Summit and remained active in the First United Methodist Church there for the rest of their lives.



“My mother was a hospital volunteer and my father volunteered at the [John Knox] care center. My father also was “on call” for Spofford Home. They called on him for everything. He very much believed in Spofford and their mission of helping troubled children,” explains Donna. “Because of my father’s love for and dedication to the children at Spofford, I believe that this endowment fund should help children around the world.”

Using proceeds from her parents’ estate, Donna created a permanent endowment fund at the Foundation that now sends annual distributions to three children’s charities: Spofford Home (now Cornerstones of Care – Spofford Campus) which serves children in the greater Kansas City area; Children’s Hope Chest which serves orphaned children in Romania, Russia, and elsewhere; and Watoto Children’s Home which assists orphans in Uganda, Africa.

Donna sees this fund as a continuation of her parents’ positive influence in the world. “In this way [they will] continue to make the world a better place for generations to come as children around the world are helped to reach their fullest potential.”

Paying it forward is a Burks family tradition, and the Foundation is honored to help expand the reach of that tradition far into the future.

## **Epworth Children & Family Services - St. Louis**

James & Elizabeth Hertzler Permanent  
Endowment Fund

Henry F. & Roberta H. Niemann  
Memorial Fund

Rev. David W. Richardson Memorial  
Endowment Fund

The Norman & Eureath Schoepfel  
Memorial Endowment Fund

## **Fairfax UMC**

Charles “Chalky” & Pauline Arnold  
Scholarship Fund

## **Foundation College Scholarships**

Clint & Marge Hawkins Memorial  
Christian Education Trust

Lawrence & Gracia Herbert  
Scholarship Fund

Merrydelle G. May Perpetual  
Memorial Fund

Judge Leah B. McCartney  
Scholarship Fund

Mary Alice Reinhardt Memorial  
Scholarship Fund

Mildred Willock Scholarship Fund

## **Foundation Seminary Scholarships**

Bert Bolin Seminary Scholarship Trust  
Selma Borgeson Seminary

Scholarship Fund

Oscar Cole Seminary Scholarship Trust  
Lawrence & Gracia Herbert

Scholarship Fund

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 Scholars Fund

The Timothy Seminary  
Scholarship Fund

## DESIGNATED FUNDS *con't*

### Foundation Ministry Grants

Anderson/Klosterman Charitable  
Memorial Trust  
William E. Baker Permanent Trust Fund  
Charles Cecil & Joy Dean Bush  
Memorial Fund  
Franklin & Louise Cole  
Unrestricted Fund  
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Memorial Unrestricted Fund  
Directors' Permanent Endowment Fund  
Helen Gibbs Memorial Fund  
Alexander & Gilbreath Endowment Fund  
Chance Harp Memorial Fund  
Ethel K. Hayward Memorial  
Endowment Fund  
Betty Kishpaugh Memorial Fund  
Bates Lohman Memorial Fund  
Reverend Keith & Barbara Maxwell  
Memorial Trust  
Merrydelle G. May Perpetual  
Memorial Fund  
Lloyd & Adena McKemey  
Endowment Fund (2)  
C. Benson & Dymple Medlen  
Memorial Fund  
Celeste S. Menees Endowment Fund  
Vernon & Allie Meyer Unrestricted  
Memorial Fund  
Calvin & Mary Moore Memorial Trust  
E.A. Morgan Family Endowment Fund  
Paul L. & Helen Shuck Ross  
Memorial Trust  
Rogers & Miriam Wohlberg  
Memorial Fund  
Rev. Theodore H. Wolff Administrative  
Memorial Trust  
Gerald E. Yardley Memorial  
Endowment Fund

## THE ADWELL GOOD SAMARITAN FUND



Earl Adwell and Edna Slagle grew up on family farms near Ravenwood, in northwest Missouri, in the first quarter of the 20th century. They married in 1929 and farmed for many years a few miles south of Ravenwood. They lived quiet, productive lives and were good neighbors and friends to many in the area. Earl served his community on the Co-op creamery board and the school board.

Blessed by reasonably good health, each lived into their 90's. Most of their retirement years were lived in town, just a couple of blocks from the Ravenwood Methodist Church which they had joined soon after World War II. There, they enjoyed interaction with friends and

neighbors and visits by their two married daughters and numerous grandchildren.

Their oldest daughter, Verna Adwell Rhodes, and her husband, Jim, established the Earl and Edna Adwell Good Samaritan Fund several years ago in honor and memory of her parents. As an endowment, the fund provides annual aid to those in need of neighborly help within the Ravenwood community. The Ravenwood United Methodist Church trustees work with the Office of Community Service for Nodaway County to find qualified recipients. Over the last ten years, the fund has provided utility and rent assistance, materials to build a ramp for a teen injured in an automobile accident, assisted with a variety of projects at Northeast Nodaway School, established a county suicide prevention program, and supplied tuition assistance for a young boy to continue attending preschool.

This fund is continuing the Adwell's love and support for their neighbors and community through the ministry of their beloved church. If there is someone you would like to honor in this way, give the Foundation a call at 800-332-8238.

**Foundation New Church Development Grants**

Rev. Charles & Bernice Miller New Church Development Trust

**Gallatin UMC**

Jack N. Young Memorial 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 - St. Joseph**

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

**Kingdom House**

Matt & Sheila Cappello "For Elise & Sam" Fund

**Kingswood Manor - Kansas City**

Pearle Davis Memorial Fund

**Knox City UMC**

Clifford & Mary A. Croy Endowment Trust

**La Croix UMC - Cape Girardeau**

Ron & Linda Watts Ministry Scholarship Endowment Fund

**LaPlata UMC**

Vera Gillet Permanent Trust  
Paul L. Ross Permanent Trust

**Leslie UMC**

Matilda S. Wolff Capital Maintenance Fund

**Liberty UMC**

The Fred A. Dick Endowment Fund  
Lonie & Joan Hank Charitable 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 - Espanola, NM**

The Marian L. Firestone Scholarship Fund

**Mexico UMC**

John & Shirley McClure Youth Ministry Memorial Fund

The Norman & Eureath Schoeppel Memorial Endowment Fund

**Midway Locust Grove UMC**

Nola D. Robinson Memorial Fund

**Milan UMC**

Phillip M. Marr Charitable Memorial Trust

**Missouri UMC - Columbia**

Jim Burch Memorial Fund  
Fred & Rebecca Meinershagen Memorial Fund

The Norman & Eureath Schoeppel Memorial Endowment Fund

**Missouri United Methodist Church Women**

The Norman & Eureath Schoeppel Memorial Endowment Fund

**MO Conference**

William L. & Helen J. Krause Memorial Fund

Bishop Robert Schnase Five Practices Fund

**MO Conference**

**Board of Ordained Ministry**

Hubert Bicknell Walker Fund for Ordained Ministry

**MO Conference Board of Pensions**

Reverend Theodore H. & Matilda Wolff Memorial Trust

**MO Conference Congregational Development**

Mary Margaret Cairns Charitable Memorial Fund

George Clinton Memorial Fund

Adrian & Margaret Harmon Ministry Endowment Trust

**MO Conference**

**Fund for Area Development**

Anonymous Perpetual Fund

**MO Conference Camps**

Gunn City UMC Endowment Fund  
Robert & Geraldine Glenn Camp Scholarship

King Hill UMC Camp Scholarship Fund

Rev. David W. Richardson Memorial Endowment Fund

**MO Conference Mission, Service and Justice Ministries**

Betty Admussen Native American Scholarship Fund

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

**Nelson Memorial UMC - Boonville**

Nelson Memorial UMC Van Fund

**Nelson Memorial UMC - East Prairie**

Lela Hill Scott & Arpa Hill Lewis Memorial Fund

## **DESIGNATED FUNDS** *con't*

### **Neosho UMC**

Neosho Music Fund

### **Normandy UMC**

Leander E. & Nellie R. Rossel  
Perpetual Fund

### **North Kansas City First UMC**

Marjorie Hendren Charitable Fund

### **Ohio Street UMC - Butler**

Family Life Center Fund

### **Old Appleton Cemetery**

Zion UMC of Old Appleton Cemetery  
Endowment Fund

### **Ozarks Methodist Manor - Marionville**

Ogle O. Menees Permanent Trust

### **Ozark UMC**

Mildred L. & James T. Workman  
Charitable Trust

### **Perkins School of Theology - Dallas, TX**

Clarence B. & L. Courtney McOwan  
Memorial Fund

### **Ravenwood UMC**

Adwell Good Samaritan Fund

### **reStart, Inc. - Kansas City**

William & Blanche Simmer  
Endowment Fund

### **Rocheport UMC**

Edna M. Burch Memorial Fund

### **Saint Paul School of Theology - Kansas City area**

The Boone and Nadine T. Ingels  
Memorial Scholarship Fund

### **Salem in Ballwin UMC**

Marie Mordt Brakemeyer Memorial  
Charitable Fund

### **Sedalia First UMC**

N.B. Williams Perpetual Memorial  
Endowment Fund

### **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 - Warren County**

Leroy Brakemeyer Memorial  
Charitable Fund

### **Spofford - Kansas City**

Ivan & Mildred Burks Fund

### **St. John's UMC - Kansas City**

Alwin & Joyce Rector Donor  
Restricted Trust

### **St. Peter UMC - Blue Springs**

Rachel House Hudson Camp Fund

### **The Bridge - St. Louis**

Mission & Service St. Louis 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

Dorothy Schellhase Permanent  
Endowment

William & Blanche Simmer  
Endowment Fund

### **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 - Lutz, FL**

Ivan & Mildred Burks Fund

### **Wesley UMC-Jackson**

Mr. & Mrs. Carl Trickey Permanent  
Endowment Trust

### **Wesley UMC - Springfield**

Margaret Curtis Permanent  
Endowment Trust

### **Wesley Memorial UMC**

Franklin & Louise Cole Memorial Fund

### **Woodlandville UMC**

Anonymous Education Fund

### **Zion UMC-St. Louis**

Chris W. & Shirley J. Fotenos  
Charitable Fund

# STOCK & MUTUAL FUND GIFTS

## Support Your Favorite Ministry, Avoid Taxes, Increase Income

If you are like most individuals, the value of your stock and other investments has grown over the years. Perhaps you are entering your retirement years and are wondering how you can turn your highly appreciated assets into a charitable gift.

You may also be concerned about the possible capital gains tax due if you sell your stock. At the same time, you want to give back and make a difference.

If you identify with any of these situations, the solution may be a charitable gift of stock to your church or other favorite ministry.

**Make a gift of stock by taking these simple steps:**

**VISIT** the Foundation website to download the Stock Gift Transfer form or call the Foundation.

**GIVE** the completed form to your broker or account administrator and send a copy to the Foundation.

**RECEIVE** your gift receipt in the mail.

The proceeds from the sale of your stock gift goes where *you* direct - fulfill your pledge at church, donate to a mission project, or start your own fund at the Foundation.

Information, including the transfer form, is available at [www.mumf.org](http://www.mumf.org), or call us at 800-332-8238.

## CHARITABLE REMAINDER TRUSTS 2016

(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**

Clejo King

### Endowment for Discipleship

(New Churches)

Earl J. Wipfler, Sr.

### Foundation

Sydney Ann Atkins

Audrey Lytle

M. Leo Shumaker

Althea Smithers

### Multiple Beneficiaries

Eve Spencer

### Salem in Ladue UMC

Hans Fischer

### Zion UMC - St. Louis

Althea Smithers

# ASSETS UNDER MANAGEMENT

	December 31, 2016 Unaudited	December 31, 2015 Audited
Unrestricted Net Assets	11,598,632	11,427,467
Temporarily Restricted Net Assets	3,685,478	5,994,107
Permanently Restricted Net Assets	11,037,456	8,069,510
Custodial Investment Accounts	60,033,046	53,805,721
Charitable Gift Annuities	2,754,036	2,393,157
Charitable Remainder Trusts	1,880,648	1,780,261
Other Assets	- 0 -	648,874
<b>Total</b>	<b>\$90,989,296</b>	<b>\$84,119,097</b>

## TEN-YEAR ANNUALIZED AVERAGE NET RETURNS

AGGRESSIVE FUND  
TOTAL ASSETS:  
\$45,676,541

Historical Returns (%)\*

Last 12 Months:	6.7%
Last 3 Years:	2.8%
Last 5 Years:	7.0%
Last 10 Years:	3.7%
Since Inception: (June 1994)	8.1%

BALANCED FUND  
TOTAL ASSETS:  
\$37,753,244

Historical Returns (%)\*

Last 12 Months:	6.6%
Last 3 Years:	2.3%
Last 5 Years:	5.5%
Last 10 Years:	4.2%
Since Inception: (December 1990)	7.5%

CONSERVATIVE FUND  
TOTAL ASSETS:  
\$4,564,490

Historical Returns (%)\*

Last 12 Months:	5.1%
Last 3 Years:	1.7%
Last 5 Years:	3.2%
Last 10 Years:	4.1%
Since Inception: (April 1997)	5.3%

\* 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.

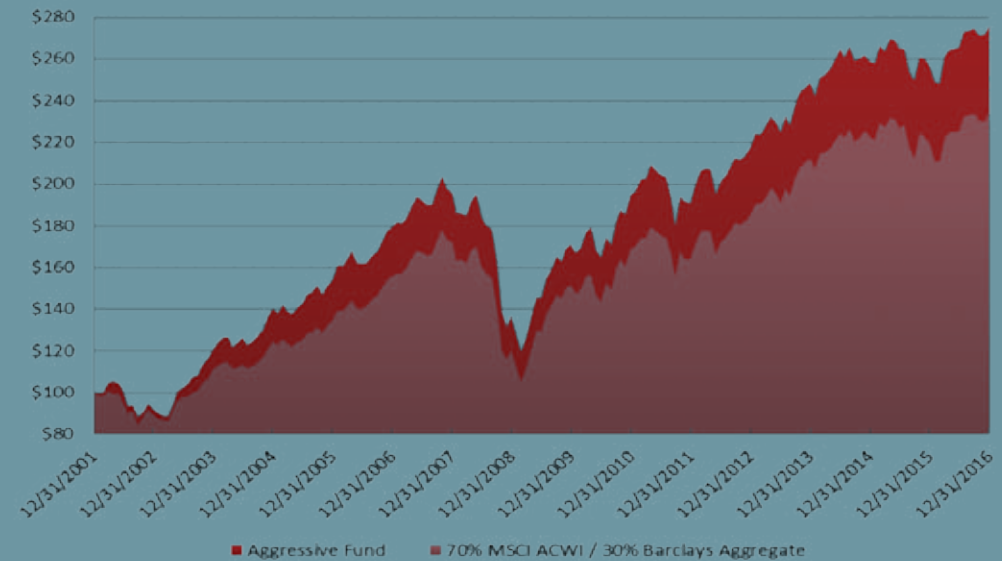
# INVESTMENT PERFORMANCE

*The investment program seeks to preserve principal, maintain purchasing power and provide reliable and sustainable income for the support of ministry. Foundation investments are broadly diversified among assets and markets to achieve prudent return and risk characteristics while striving to maintain consistency with the goals outlined in the social principles of the United Methodist Church.*

To learn more, contact the Foundation office at **800-332-8238** or visit us online at **www.mumf.org**.

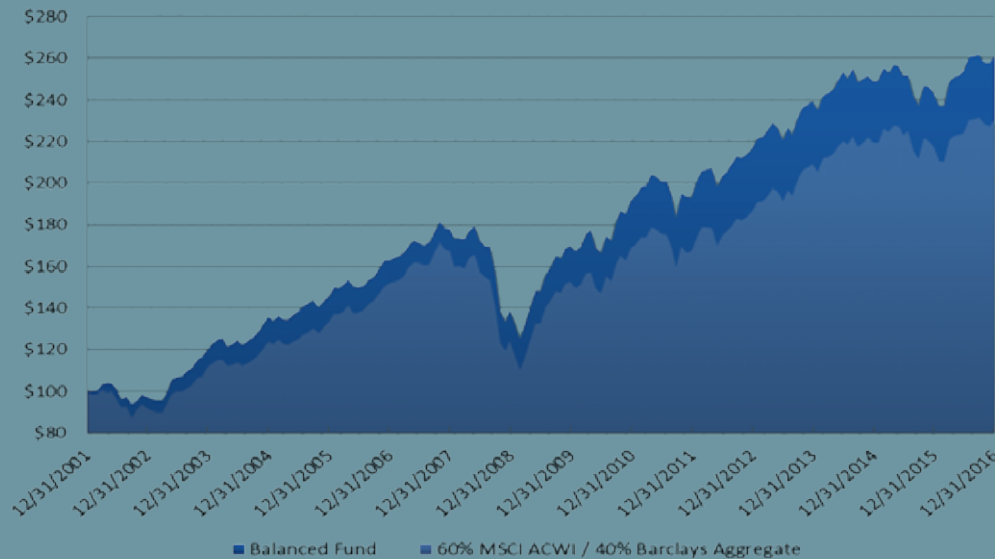
## AGGRESSIVE FUND

Growth Of \$100 Dollars



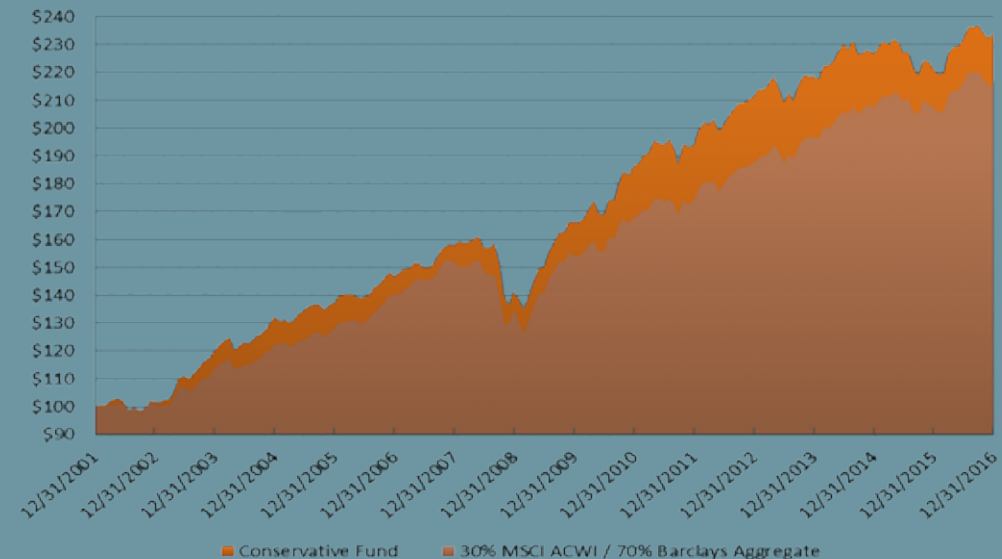
## BALANCED FUND

Growth Of \$100 Dollars



## CONSERVATIVE FUND

Growth Of \$100 Dollars



# FOUNDATION STAFF



**David P. Atkins, JD**  
Executive Director



**Monett Lite**  
Director of Operations



**Myles Hinkel**  
Director of Development



**Chris Bouchard**  
C2FM Director



**Linda Mary Neal, Esq.**  
Foundation Representative



**Lauran Burgin**  
Communications &  
Events Coordinator



**Carla Hunter**  
Administration &  
Finance Associate

**Give us a call!**

**For a Trustees Meeting, Stewardship Team, Sunday School, Breakfast Club...**

**Where your church members are gathered, your Foundation will be there to share ideas and information...and coffee!**

**Missouri United Methodist Foundation**

**800-332-8238**

**[www.mumf.org](http://www.mumf.org)**

# PROGRAMS & WORKSHOPS

## Keep your leadership team informed

### If your church already uses the Foundation

Invite a Foundation representative to give an annual update at a regular leadership team meeting. Make this part of your training process for new team members and a positive refresher for the seasoned veterans.

### If your church does not use the Foundation

Let us help your leaders understand how to access planned gift services, sample policies and best practices, ministry grants, scholarship opportunities for students and services for long-term funds administration.

## Presentations to fit any group, any time

### Saturday Morning Coffee

Take about an hour to discuss estate planning issues and ways to leave a lasting legacy at your church.

### Sunday School

Take about 20 minutes and let your adult groups know how easy a gift of stock, an estate gift, or a gift that provides fixed income can be to create—and what a difference it can make for your church.

### After-Church Luncheon

Take about an hour and a half to cover basic estate planning issues, the ways charitable gifts can complement other plans, and discuss how a legacy gift can make a difference at your church.

Foundation programs and workshops are always free of charge.  
Call us at 800-332-8238 to schedule a workshop or program.

## Capital Campaign Consulting

The Missouri United Methodist Foundation (MUMF) is pleased to announce its selection of Horizons Stewardship (Horizons) as its preferred provider of capital campaign consulting services to United Methodist congregations in the Missouri Annual Conference. The partnership supports MUMF's mission to offer a full range of stewardship services that strengthen congregations and enhance ministry effectiveness throughout the conference. Horizons assists churches and other faith-based institutions to make strategic decisions, grow in faith, and secure the necessary capital resources for vital and effective ministry.



Information and resources can be found at [www.mumf.org](http://www.mumf.org) or by calling 800-332-8238.

 MISSOURI UNITED METHODIST  
**FOUNDATION**

PO Box 1076 • Columbia, MO 65205  
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*"Hope" is the thing with feathers -*

*Emily Dickinson*

