



MISSOURI UNITED METHODIST
FOUNDATION

2018

ANNUAL REVIEW

YOUR GATEWAY TO GIVING

WORKS IN PROGRESS...

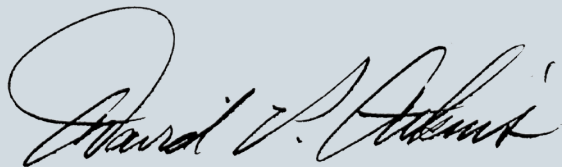
The Gateway Arch in St. Louis brings many adjectives to mind – beautiful, monumental, iconic – it is recognized all over the world as a symbol of the city, the state of Missouri, and the nation. A simple curve on the scale of a skyscraper, it conjures the metaphorical aspirations of tower, bridge, and grand gateway – symbols of achievement, connection, and of bright, unknown possibilities beyond our present place and moment.

The Arch opened to the public in 1967 – the same year that some other visionaries started the Missouri United Methodist Foundation. In 2018, the Arch ‘reopened’ following a \$380 million makeover to the museum and grounds. Although the soaring steel arc itself is unchanged, the park is more beautiful, more accessible, and interprets the relevant history with greater insight and complexity than ever before.

My hope is that this 2018 Annual Review reflects in many small ways aspirations similar to those of our beloved local monument – achievement, connection, and possibilities. Our Wesleyan tradition reminds us that Christian perfection is a journey embarked upon by very imperfect people. We are all works in progress – our attempted renovations not always successful – who yet aspire individually and together to take hold of that life that is truly life.

Your Missouri United Methodist Foundation is renewed each day by visionary disciples whose generosity, commitment, and faith exceed the boundaries of the here and now. The Foundation is a gateway to giving – to generous living – and a means to share in the bright, unknown possibilities of God’s abundant future.

Grace and peace,



President





Photo: David Atkins, President/CEO

BOARD OF TRUSTEES

The Board of Trustees monitors and establishes policies for the operation of the Foundation; supports the work of the Foundation with their time, expertise, and financial resources; and encourages the ministry and mission of the Foundation as representatives in their churches, districts, and annual conference.



Larry Tucker
Chair
Kansas City, MO
Liberty UMC



Kent Thomas
Vice Chair
Springfield, MO
Schweitzer UMC



Bob Rowlinson
Treasurer
St. Louis, MO
Kirkwood UMC



John Rice
Secretary
Columbia, MO
St. Luke UMC



Pam Moench
Investment Chair
St. Louis, MO
The Gathering UMC



Morris Dock
Grant Chair
Springfield, MO
Campbell UMC



Janet Jacobs
Scholarship Chair
Fayette, MO
Linn Memorial UMC



Bob Brown
Joplin, MO
St. Paul's UMC



Charles Foudree
Lee's Summit, MO
Christ UMC
Independence



Jon Gray
Kansas City, MO
Centennial UMC



Marsha Limbaugh
Cape Girardeau, MO
Centenary UMC



Lisa McLaughlin
St. Louis, MO
Webster Hills UMC



Michael McManis
Springfield, MO
First UMC - Kirksville



Julie Salmon
Kansas City, MO
St. John's UMC



Cliff Sledge, Jr.
Florissant, MO
Salem in Ladue UMC



Jeff Stuerman
St. Charles, MO
Manchester UMC



Tom Taylor
Kansas City, MO
Avondale UMC



Steve York
Lee's Summit, MO
Church of the
Resurrection



Bishop Bob Farr
Ex-Officio
Columbia, MO



Nate Berneking
Ex-Officio
Columbia, MO

CHARITABLE GIFT ANNUITIES

Charitable Gift Annuities provide income for the life of the annuitant. Then, 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.

\$391,586

ANNUITY INCOME PAYMENTS MADE TO INDIVIDUALS

Photo: King's Way United Methodist Church



Avondale UMC- Kansas City

Margery Kuhler (7)

Blue Springs First UMC

John & Katherine Rosendahl

Bolivar UMC

Frank & Rita Terhune

Central Methodist University

Raymond & Catherine Carnes

Donald A. Davis, Sr. (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)

Cornerstones of Care- Spofford Campus

Margery Kuhler

**Cornerstones of Care-
Spofford Foundation**

Mary Beth Seger

Country Club UMC- Kansas City

Edward C. & Mary Ellen Olsson

John & Errett Schmid

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

Anonymous

Jack Adams

Bernice Chastain

Evelyn Donnell

Carl & Shirley Garrett

Ann Johanson (2)

Guy & Joan Johnson

Missouri United Methodist Foundation

Anonymous

Robert L. & Velma F. Felt

Byron Gilbreath

Mary Ellen Meyer

Lois Mondy

Elizabeth Nace

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

Kirkwood UMC

Deane & Fancine Thompson

Lincoln UMC

Juanita M. Howland

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 (8)

Newhouse- Kansas City

Dortha Mae Olsen

New Hope UMC- Richmond

Mary Lou Gentry

North Cross UMC

Ione McIntyre

North Kansas City First UMC

Marion Gentry

Oregon UMC

Elizabeth Waller (2)

Ozarks Methodist Manor- Marionville

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

Saint Paul School of Theology

Anonymous

Mike & Karen Farrell

Sally Firestone (3)

Gary Harms

Cleo Kottwitz

Ruth Nothdurft

Isabelle Sauer

Sedalia First UMC

Robert Upton

Shepherd's Center- St. Louis

Richard Vreeland

Siloam Chapel Cemetery Association

James & Claire Matthews

St. Luke's UMC- Kansas City

M. Eileen Crabtree

St. Stephen UMC- Troy

Faye Pavelka

Stoutland UMC

James & Juanita Knight

Tennessee Wesleyan College

Anonymous

Trinity UMC- Piedmont

Anonymous

UMC of Rich Hill

Wanda Ebert

UMCOR

Anonymous (2)

Byron Gilbreath

Gerald Huddleson (5)

Joe & Janet Laws

Webster Hills UMC

Lloyd Watkins

Windsor UMC

Lela Baskins

Windsor UMC UMW

Lela Baskins

Zion UMC- Gordonville

Anonymous

ESTABLISH YOUR OWN CHARITABLE GIFT ANNUITY



1 Make a charitable donation to the Foundation using cash, marketable securities or other assets to create your charitable gift annuity.

2 Based on your age and gift amount, the Foundation pays you a fixed amount quarterly, semi-annually or annually for life.

3 Your local church or other favorite United Methodist charity(ies) receive the remaining value of the gift at your death.

- Payments may be directly deposited to your bank account or you may elect to receive a check
- The Foundation provides a Form 1099-R to you each year for tax reporting purposes
- A portion of the initial gift is tax deductible (for those who itemize and can use it)
- A portion of the annual payments are tax-free for a period of time

ONE LIFE		TWO LIVES	
AGE	RATE	AGE	RATE
65	5.1%	65/70	4.7%
70	5.6%	70/75	5.2%
75	6.2%	75/80	5.7%
80	7.3%	80/85	6.6%
85	8.3%	85/90	8.0%
90+	9.5%	90/95+	9.3%

Samples from New Rate Chart Effective July 1, 2018

Learn More

Contact our office at 800-332-8238 for a free custom illustration showing the benefits of your own charitable gift annuity.

Photo: Chris Bouchard, C2FM Director



C2FM

\$190,228 DIRECT AID DISTRIBUTED

226 CLERGY SERVED

442 HOURS OF FINANCIAL COACHING

The overall purpose of The Clergy and Church Financial Ministry – C2FM is to better equip clergy and lay leaders to be effective financial leaders in their congregations by increasing the health, vitality and ministry effectiveness of their respective churches. This is accomplished through financial education, direct aid and personal coaching.

Quality programming to help clergy and laity learn more about financial well-being is sponsored statewide by C2FM. Making Money Count, Financial Peace University, Clergy Benefits Academy and regional workshops around the state have been attended by 215 pastors and 158 laity.

Education for congregations is another C2FM priority. Resources to support a church's financial ministry are available for check-out from the C2FM library and funds are also available to help churches offset the costs of presenting financial ministry programs.

C2FM provides direct aid to Missouri clergy to assist with health care expenses, student loan repayment, consumer debt, clergy relocation, health & household emergencies, professional services, and scholarships for seminary.

Direct aid funding comes from donor gifts that are matched by the Lilly Endowment. At the end of 2018, \$800,778 had been raised and matched for direct aid with \$190,228 distributed to 54 pastors.

Direct aid recipients are required to enroll in the financial planning and coaching program. Any clergy person may, however, enlist a personal coach at no cost. So far, 442 hours of personalized financial coaching has been delivered to 86 pastors, free of charge.

People and churches prosper when pastors and financial ministry teams develop strategies to teach God's timeless wisdom regarding the stewardship of all God's gifts. Contact the C2FM Director, Chris Bouchard at 573-268-4440 or visit ww.mumf.org/C2FM to learn more about the opportunities offered by C2FM.

C2FM HEADING TO PHASE 2

In December, the Missouri United Methodist Foundation was awarded a second grant from the Lilly Endowment to help continue and sustain The Clergy and Church Financial Ministry -C2FM as a permanent part of Foundation services.

This next phase of the C2FM program will include developing educational partnerships, web-based curricula and expanding coaching services to pastors. Crucial to the success of these initiatives will be the work of embedding the C2FM services into the existing systems and structures of the Missouri Annual Conference (MOAC) of the United Methodist Church and creating a model for the denomination to improve its candidacy, ordination and continuing education practices.

An online tailored suite of personal finance resources entitled Making Money Count for Clergy will be provided. C2FM will also partner with the Church of the Resurrection and Saint Paul School of Theology to capture existing training curricula, titled Financial Practices for Churches of All Sizes, to expand and enhance that curriculum and present it in video modules for use by clergy, lay leaders and seminarians via a web-based learning platform.

Participating pastors continue to report that the most important part of C2FM is the personal support of a coaching relationship that helps them implement what they've learned into their personal and professional lives. Coaching services will continue to be a fixture of C2FM with an aim to extending the current two year timeframe for participants and adding C2FM staff to offset demand.

The outpouring of gifts and the Phase II grant are wonderful affirmations of the C2FM program and the positive impact it is having in support of Missouri's UM pastors and congregations. The support and leadership of the Foundation Board of Trustees, the Missouri Annual Conference, the Lilly Endowment and many generous individual donors have made this possible. *Thank you.*



FUND YOUR MISSION

When you create a designated fund benefiting your church or favorite UM agency, you help achieve the mission.

The following funds provide income to a church, agency, or ministry as designated by the donor. Beneficiaries receiving income are listed in bold.

\$1,098,411

DISTRIBUTED TO MISSOURI UM
CHURCHES, SOCIAL SERVICE
AGENCIES, EDUCATIONAL
INSTITUTIONS AND SEMINARIES TO
HELP THEM ACHIEVE THEIR MISSIONS.

Photo: Craig Stevenson, former Mozambique Initiative Director, visiting the Carolyn Belshe Orphanage which receives income from the Woodlandville UMC Mozambique Orphanage Fund.



**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

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 & Laity Education

Bishop Robert & Thelma Goodrich
Memorial Trust
Nancy McMullin Permanent
Endowment Fund
Ordinands Education &
Spiritual Growth Fund

Clergy Support

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

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

**Community UMC United
Methodist Women- Columbia**

Miriam McClure Memorial Scholarship

**Cornerstones of Care Spofford
Campus - Kansas City**

Ivan & Mildred Burks Fund

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

The Lonie C. & Sandra K. Hank
Charitable Fund

Eugene L. & Sarah G. Lowry
Charitable Fund

James & Marjory Mordy Charitable Fund

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 Schoeppel
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

Warren J. Meyer Memorial

Scholarship Fund

Mary Alice Reinhardt Memorial

Scholarship Fund

Mildred Willock Scholarship Fund

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

Robert & Geraldine de Jong

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

Rev. 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

The Claude William Pemberton &

Virginia Bosse Pemberton

Charitable 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

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

Foundation New Church**Development Grants**

Rev. Charles & Bernice Miller New Church
Development Trust

Gallatin UMC

Jack N. Young Memorial Fund

Gateway Central District

Designated Fund
Strategic Ministry Fund
Urban Fund

Gateway Central/Regional Districts

Effie June Poole Memorial Trust
Dr. Fry Memorial Hispanic Fund

Gateway Regional District

Heritage Fund

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

Holcomb UMC

The Blakemore Capital Maintenance &
Improvement Fund

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

Kirkwood UMC

Kirkwood UMC Maintenance &
Replacement Fund
The T. David & Carol Daniel Fund for the
Development of Youth in Music &
Worship

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
The Norman & Eureath Schoepfel
Memorial Endowment Fund

**Missouri United Methodist
Church Women**
The Norman & Eureath Schoepfel
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
Rev. 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
The Claude William Pemberton &
Virginia Bosse Pemberton
Charitable Fund

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 & 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

Neosho UMC
Neosho Music Fund

Normandy UMC
Leander E. & Nellie R. Rossel
Perpetual 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 -
Overland Park, KS**
The Boone & 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

Shiloh UMC - Foristell

Jack & Evelyn Goode Educational Fund

Sikeston First UMC

Garwood & Ruth Felker Sharp
Scholarship Fund

Garwood & Ruth Felker Sharp
Community Outreach Fund

Heavenly Treasures Preschool
Anonymous Trust Fund

Smith Chapel UMC - Sikeston

Ruth Felker Sharp Scholarship Fund

Smith Chapel UMC – Fayette

Smith Chapel Scholarship Fund

Smith Creek UMC - Warren County

Leroy Brakemeyer Memorial
Charitable Fund

St. John's UMC - Kansas City

Alwin & Joyce Rector Donor
Restricted Trust

St. Mark's UMC – Florissant

Anderson/Klosterman
Charitable Memorial Trust

St. Paul's UMC – Joplin

The Maynard & Louise Brown Memorial
Endowment Fund

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

Dorothy Schellhase
Permanent Endowment

William & Blanche Simmer
Endowment Fund

University UMC - St. Louis

James & Elizabeth Hertzler
Permanent Endowment Fund

University UMC

United Methodist Women - 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- Sedalia

Henry F. & Roberta H. Niemann
Memorial Fund

**Wesley UMC United Methodist
Women- Sedalia**

Henry F. & Roberta H. Niemann
Memorial Fund

Wesley UMC – Springfield

Margaret Curtis Permanent
Endowment Trust

Wesley Memorial UMC - Festus

Franklin & Louise Cole Memorial Fund

Woodlandville UMC

Anonymous Education Fund

Zion UMC-St. Louis

Chris W. & Shirley J. Fotenos
Charitable Fund

Zion UMC – Truxton

The Zion United Methodist
Scholarship Fund

HOW TO CREATE YOUR OWN DESIGNATED FUND

Creating a designated fund at the Foundation is a wonderful way to ensure long-term support for the specific United Methodist church, agency, institution or ministry of your choice. By establishing a designated fund, you are creating a means to continue your charitable giving beyond your lifetime and to touch the lives of future generations.

INITIATE:

We help you write the instructions that we will follow to ensure your charitable goals are achieved.

CONTRIBUTE:

Make your initial contribution and make additional gifts of any size at any time.

SHARE:

Each year your charity receives a check from the fund you created.


A photograph of a village in Uganda at sunset. In the foreground, several children are playing soccer on a grassy field. In the background, there are several simple, single-story brick buildings with corrugated metal roofs. The sky is a mix of orange, pink, and purple, with some clouds. The overall scene is peaceful and shows a community activity.

Photo: Children playing soccer in a Watoto Child Care Ministries village in Uganda. Watoto Child Care Ministries receives income from the Ivan & Mildred Burks Fund.

CHARITABLE REMAINDER TRUSTS 2018

(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

Missouri UM 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

\$114,323
DISTRIBUTED TO
MISSOURI UM CHURCHES

MINISTRY GRANT PROGRAM

\$196,609
AWARDED TO 61 MISSOURI
UM CHUCHES AND SOCIAL
SERVICE AGENCIES

The churches within the Missouri Conference are reaching out to their communities in many innovative ways to build community, to inspire participation, and to interpret the timeless message of Christ in a changing world. The Ministry Grant Program of the Missouri United Methodist Foundation strives to offer financial support and affirmation for these projects.

In 2018, the Foundation awarded a total of \$196,609 to 61 grant applicants. Grants included community projects such as food pantries, after school programs, school supplies for community drives, summer camps, homeless ministries, and recovery programs. The purchase or upgrade of communication technology remains a popular request. Such equipment is used in worship to live stream services and to upgrade musical equipment. Other awards addressed ADA-compliant renovations, marketing services, new playground equipment, security systems, and church facility upgrades.

The Foundation has awarded over \$6.5 million in ministry grants since the 1970's. The Ministry Grant program seeks to nurture vital ministry and congregational effectiveness across our state.

Grant application deadlines are April 1st and October 1st each year. The grants are made possible by gifts from individuals who have built, and continue to build grant and scholarship endowments at the Foundation. To make a gift, to create a lasting legacy, or to apply for a grant, please contact the Foundation at 800-332-8238 or go to www.mumf.org.





Photo: Kids enjoying a cool off during the summer at an Eagle Lake Camp



Photo: Student celebrating during Central Methodist University 2018 Spring Graduation



EDUCATE THE NEXT GENERATION

\$195,750
AWARDED TO 110
UNDERGRADUATE
AND SEMINARY STUDENTS

Each year the Missouri United Methodist Foundation awards a number of scholarships to student members of Missouri congregations pursuing education beyond high school. In addition, seminary students who are candidates for ministry in Missouri may apply for scholarship assistance from a variety of funds administered by the Foundation. Each scholarship reflects the vision and generosity of the donors who created these funds.

For undergraduates, the Hawkins, McCartney, Reinhardt and May scholarships are awarded to eligible Missouri UM students attending any college, university or vocational school. The Herbert scholarship is awarded to eligible Central Methodist University students. In 2018, these named Foundation undergraduate scholarships provided \$28,000 to 19 United Methodist students.

The United Methodist Higher Education Foundation administers the Dollars for Scholars matching scholarship program for UM students attending UM schools. The Missouri UM Foundation adds an additional match for participating students at Central Methodist University and Saint Paul School of Theology. In 2018, the Foundation provided \$69,000 in matching scholarships to Missouri students through the Dollars for Scholars program.

Seminary education requires a serious commitment of time, talent and treasure from each student. Likewise, the Foundation is committed to providing significant financial support to ensure that qualified students have adequate resources to answer the call to ministry. In 2018, the Foundation seminary scholars grant provided \$55,000 in scholarship support to 22 Missouri seminary students, 12 of these students received an additional \$28,750 through the Foundation's C2FM program. The Kahrs, Ingles, and Herbert awards added another \$12,500 for 8 seminary students.

MISSOURI FELLOWS PROGRAM

\$652,500
PROVIDED IN GRANTS
TO 10 FELLOWS OVER
THE PAST 5 YEARS

Now in its fifth year, the Missouri Conference Fellows program is the result of a partnership between the Centers for Leadership and Congregational Excellence, the Foundation, and the local host congregations. As Reverend Karen Hayden explains, “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 president, David Atkins.

“Each aspect of the fellowship support system fulfills a unique function in equipping and supporting the new pastor for ministry,” states Fellow Peter Norton. “The fellowship program allowed me to work on staff with one of the conference’s most effective pastors [Rev. Bart Hildreth] on a generosity initiative,” explains Norton. “At this stage in my ministry, I don’t believe that I would have had the experience or vision to initiate a generosity initiative on this scale.” Norton also was involved in the budgeting process and in supervising the confirmation program.

Fellow Angie McNeil affirms that the program “has allowed me to broaden my scope to see the larger picture of ministry.” Each Fellow organizes a team of laity within the host congregation to serve as a sounding board, accountability group, and bridge to the larger congregation. McNeil adds, “My lay team allows me to understand the dynamics of age, class, gender, and ethnicity that exist in our church” and this has made her “more compassionate and understanding when it comes to discipleship.”

The Foundation has provided grants totaling \$652,500 to assist 10 fellows through the program since it started in 2014. Two fellows are selected each year for a two year residency. Interested pastors and prospective host churches should contact the Office of Leadership Excellence for more information.



Photo: Angie McNeil
preaching at Raytown
Chapel Church, a site church
of Woods Chapel UMC

INVEST FOR THE FUTURE

United Methodist churches and UM organizations join together at the Foundation to invest endowments, long-term reserves and other special use funds knowing that they can rely on prudent diversified investment as well as ready access to their funds. The Foundation provides three pooled investment options. Each pool follows a different asset allocation model with slightly different risk and return objectives. All funds are monitored by the Foundation Investment Committee, the Foundation's professional investment consultants and Foundation staff. Investment consulting services are provided to the Foundation by the St. Louis office of Mercer which specializes in consulting to over 250 endowments and foundations.

\$58,732,242

MARKET VALUE OF INVESTMENT ACCOUNTS
OWNED BY 185 MISSOURI UNITED METHODIST
CHURCHES AND 33 UM INSTITUTIONS &
AGENCIES

Photo: Liberty United Methodist Church

ASSETS UNDER MANAGEMENT

	December 31, 2018 Unaudited	December 31, 2017 Audited
Unrestricted Net Assets	11,765,458	12,905,205
Temporarily Restricted Net Assets	4,786,880	8,447,386
Permanently Restricted Net Assets	13,205,230	9,837,226
Custodial Investment Accounts	58,732,242	66,853,770
Charitable Gift Annuities	2,589,070	2,325,781
Charitable Remainder Trusts	456,391	560,820
Other Assets	0	547,773
Total	\$91,535,270	\$101,477,961

Aggressive Fund

Established in 1994, the Aggressive Fund emphasizes long-term appreciation and invests largely in equity securities. It is diversified with significant allocations to fixed income securities and alternative investments.

Balanced Fund

The Balanced Fund was established in 1990 and seeks to balance the objectives of long-term capital appreciation, income and moderation of short-term volatility. It is diversified among equities, fixed income, and alternative investments.

Conservative Fund

The Conservative Fund was established in 1997. It holds primarily fixed income securities, with a modest allocation to equity securities.

AGGRESSIVE FUND

TOTAL ASSETS:

\$48,635,466

Historical Returns (%)*

Last 12 Months:	-5.0%
Last 3 Years:	5.8%
Last 5 Years:	3.8%
Last 10 Years:	7.8%
Since Inception: (June 1994)	7.9%

BALANCED FUND

TOTAL ASSETS:

\$37,384,840

Historical Returns (%)*

Last 12 Months:	-5.8%
Last 3 Years:	4.6%
Last 5 Years:	2.8%
Last 10 Years:	6.7%
Since Inception: (December 1990)	7.2%

CONSERVATIVE FUND

TOTAL ASSETS:

\$3,603,417

Historical Returns (%)*

Last 12 Months:	-4.0%
Last 3 Years:	3.3%
Last 5 Years:	2.0%
Last 10 Years:	5.1%
Since Inception: (April 1997)	5.0%

* 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.

DONATE STOCK & MUTUAL FUNDS

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.

\$935,330

PROCEEDS TO UM CHURCHES AND INSTITUTIONS
PROCESSED THROUGH THE FOUNDATION'S STOCK GIFT
PASS THROUGH PROGRAM

Make a gift of stock by taking these simple steps:

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

2> DIRECT the proceeds from the sale of your stock: fulfill your pledge at church, donate to a mission project, or start your own fund at the Foundation.

3> GIVE the completed form to your broker or account administrator and send a copy to the Foundation

4> RECEIVE your gift receipt in the mail.

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

FOUNDATION STAFF



David Atkins
President/CEO



Monett Lite
Director of Operations/CFO



Chris Bouchard
C2FM Director



Linda Mary Neal
Foundation Representative



Lauran Janssen
Communication & Events
Coordinator



Abby Sudbrock
Office Administrator

MISSOURI UNITED METHODIST FOUNDATION

800-332-8238

www.mumf.org



PO Box 1076 ▪ Columbia, MO 65205
800-332-8238 ▪ www.mumf.org

planned giving
endowments
grants

scholarships
church investments
stewardship services

Return Service Requested

Non-Profit
Organization
U.S. Postage
PAID
Columbia, MO
Permit No. 93

“IF THE DOORS OF PERCEPTION
WERE CLEANSED, EVERYTHING
WOULD APPEAR TO MAN AS IT IS
- INFINITE.”

- *William Blake*