missouri
united methodist
foundation

2021 annual review

trusted stewards | lasting legacies | love in action

friends,

The Bible is filled with descriptions of journeys – of travelers on roads both real and imagined. Movement along a path brings encounters -- with people (known and unknown), with surroundings (familiar or strange), and often – in some form or fashion – with the Living Lord. These encounters embody the meaning, the lesson, the insight that makes the story worth the telling.

The past year has been filled with journeys and blessings. At last, the Foundation staff was able to return to the road and to meetings in-person. Our Director of Development, Rev. Laura Murphy, has maintained a steady stream of bookings – Sundays and weekdays – for leadership team meetings, grant presentations, Sunday sermons, and the new "Putting Your House In Order" workshops. Laura genuinely views her work as a ministry to church members and pastors. As she laughingly notes, "I get to share all kinds of good news!"

The Foundation's Clergy & Church Financial Ministry – C2FM – continued its outstanding service under the able leadership of Rev. Mark Struckhoff. The call to pastoral ministry is a special journey and C2FM offers educational programming, personal financial coaching, and financial grants to pastors – as sustenance, affirmation, and encouragement along the way. An unexpected blessing was C2FM's receipt of a third Lilly Endowment grant specifically to address the needs of pastors impacted by the pandemic.

On a path of a different sort, Foundation total assets climbed to new heights topping $130 million for the first time. This reflects the generosity of donors, the stewardship of congregational leaders, and the disciplined oversight of the outstanding Foundation Investment Committee, staff, and professional consultants.

We could not ask for finer companions on every journey than the amazing members of the Foundation Board of Trustees. They give freely of their time, wisdom, talents, and treasure to lead and promote the Foundation as a vital ministry to our churches. They truly embody the Wesleyan ideals of faith and service.

Of course, we travel ever onward, and this Annual Review is simply a brief opportunity to pause, take a few snapshots, share a few memories, and take stock of the road ahead. Last year I mused that the new Foundation logo was reminiscent of a church window. This year the lines may seem to suggest a crossroads – both a point of connection and a possible point of departure.

As the poet Robert Frost noted, when roads diverge we cannot travel more than one. But travel on we must – with humility, hope and love – and the abiding faith that God sees a much larger picture. Perhaps that God-sized picture is better imagined by another poet, Yogi Berra… "When you come to a fork in the road, take it."

On behalf of the board and staff of your Foundation, we give thanks for the companionship of all our fellow travelers. Whether your road feels like a way in the wilderness or a ride down Route 66, we look forward to crossing paths, finding connection – and sharing the life that is truly life.

Yours in service,

David P. Atkins
President & CEO

board of trustees

Kent Thomas
Chair

Bob Brown
Scholarship Chair

Trista Soendker Nicholson
Kansas City

Jon Gray
Vice Chair

Mark Harbison
Fayette

John Rice
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Columbia

Morris Dock
Grants Chair

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St. Louis

Steve York
Kansas City

	December 31, 2020	December 31, 2021
	Audited	Unaudited
Unrestricted Net Assets	14,643,228	15,997,659
Donor Restricted Net Assets	23,664,438	26,659,899
Agency Investment Accounts	74,015,007	83,630,039
Charitable Gift Annuities	1,958,826	2,836,454
Charitable Remainder Trusts	429,642	574,414
Other Assets	309,526	525,249
	total	
	115,020,667	**130,223,713**

total assets under administration

aggressive fund	
total assets:	$71,627,878
historical returns (%)*	
1/1/2021-12/31/2021	16.4%
last 3 years	16.0%
last 5 years	11.6%
last 10 years	9.3%
Since inception (06/94)	8.7%

balanced fund	
total assets:	$51,510,953
historical returns (%)*	
1/1/2021-12/31/2021	10.8%
last 3 years	14.0%
last 5 years	9.7%
last 10 years	7.6%
Since inception (12/90)	7.8%

conservative fund	
total assets:	$5,146,466
historical returns (%)*	
1/1/2021-12/31/201	5.9%
last 3 years	9.9%
last 5 years	6.8%
last 10 years	5.0%
Since inception (04/97)	5.6%

* 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.

ministry grant program

Does your church need some seed money? As the parable reminds us, great things can grow from a small seed.

The Foundation Ministry Grant program plants seeds each year in churches across our state. Starting a new worship service or outreach ministry? Adapting an existing ministry for a changing neighborhood? Hosting a special event or community project? Think about how a Foundation Ministry Grant might not only help – but also be an encouragement for the hard work of volunteers and an incentive for greater support within the congregation.

Most Foundation grants are between $500 and $5,000, with a few larger grants from time to time, but rarely exceeding $15,000. Successful applications make a clear connection between the project, the missional impact, and the health and vitality of the congregation.

These are challenging times that call for thoughtful creativity and experimentation in all aspects of church life. Let's keep planting those seeds!

$87,886
Spring
$106,260
Fall

$194,146
total ministry grants

The Foundation has awarded over $3.9 million in ministry grants since 2001.

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, the grant and scholarship endowments at the Foundation. To learn more, please contact the Foundation at 800-332-8238 or go to www.mumf.org.

Rev. Mark Struckhoff
C2FM Director

clergy & church financial ministry – C2FM

"Our purpose is serving pastors"

The year 2021 marked C2FM's sixth year of service improving financial literacy, leadership, discipleship, and ministry for Missouri clergy and congregations. The work was born and continues to thrive thanks to start-up Lilly Endowment grants of over $1.6 million to build up and strengthen the financial wellbeing of pastors. Generous supporters across Missouri have added over $500,000 to the total.

The global pandemic certainly put a fresh focus on personal and financial wellbeing! The pandemic also prompted a strategic response from the Lilly Endowment to offer supplemental grants aimed at supporting pastors impacted by the pandemic. C2FM celebrated receiving an additional $250,000 grant in December 2021, with a challenge to raise $250,000 to be matched by the Lilly Endowment. By the end of 2023, C2FM will have generated nearly $3 million in services and direct financial aid for our clergy and their families.

Other milestones in 2021 include:

- C2FM has partnered with **Your Money Line**, allowing FREE access to financial problem-solving resources and financial professionals for every United Methodist pastor (and family) in Missouri.
- A new resource, **Saving Grace: A Guide to Financial Wellbeing,** was released by Cokesbury and pilot courses offered by C2FM for pastors and lay leaders have been enthusiastically received and well attended. The resource

is written by United Methodists for United Methodists and emphasizes a relationship with money grounded in Wesleyan theology.

- In July 2021, the Department of Education announced that pastors and those employed by local churches are now eligible to apply for **Public Service Loan Forgiveness (PSLF)**. In partnership with Your Money Line, C2FM is helping many pastors and their families as they seek relief of their federal student loan debt through PSLF.

C2FM continues to be a strategic partner in the ecosystem of the Missouri Conference. Some significant datapoints in 2021 include:

- The cumulative total of clergy wellbeing grants awarded reached more than $560,000 in support of 114 pastors and their families
- 163 clergy participated in 13 different C2FM financial literacy/leadership programs
- 45 pastors and 17 clergy spouses engaged in 234 financial coaching sessions for a total of 196 hours of direct coaching time
- 202 congregations were represented in their participation in C2FM financial literacy/leadership programs
- Overall, participating pastors in C2FM on average increased their credit scores by more than 75 points; average student loan debt has been reduced by 33%, and average consumer debt shows a reduction of 64%.

The true impact of C2FM is perhaps best expressed in the voices of our pastors...

> "I was drowning in debt. Thanks to C2FM, I am now swimming in savings!"

> "C2FM has greatly impacted my personal and family life... receiving a grant gave us the momentum to keep following through."

> "My C2FM coach helped with the emotional part of managing money: I came to realize I was making the problem bigger in my head. I feel much better now that I have set priorities and have a plan."

> "As I continue using the services of C2FM, I'm excited to see the effects it has on my church as they learn and discover what I have learned. It is beyond amazing to see how God multiplies the blessings."

The board and staff of your Missouri United Methodist Foundation and its C2FM program feel truly blessed to be a blessing for our clergy and congregations. To learn more about C2FM, visit www.mumf.org or contact C2FM Director, Rev. Mark Struckhoff at mstruckoff@mumf.org.

$43,182,807

Total value of endowments as of 12/31/2021.

endowments and designated funds

Individual donors create endowment funds at the Foundation in a variety of ways. The basic concept of an endowment is that the gift is invested and the earnings from the gift benefit one or more charities or charitable activities every year, forever. An endowment is a powerful tool for growing and sustaining ministry. In addition, an endowment can carry a memorial name that is a truly lasting tribute.

In 2021, the Foundation distributed $746,548 from endowments benefiting local churches, social service agencies, and students at colleges and seminaries.

Archie UMC
The Waldean L. Loughary Memorial 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
Jesse & Grace Pursley Endowment 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
Wayne & Nancee Byington Memorial Scholarship Fund
Treva Hall Scholarship Fund
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
Judy Martin Parsons 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 Funds
The Lonie C. & Sandra K. Hank Charitable Fund
Dwayne & Mary Hochhalter Charitable Fund
Garth & Cheri Leigh Charitable Fund
Eugene L. & Sarah G. Lowry Charitable Fund
Donald & Sara Mahaffy Charitable Fund
Beverly & Bill Matteson Charitable Fund
James & Marjory Mordy Charitable Fund
Strickland Family 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
Ronald & Joyce Crossen Scholarship Endowment Fund
Agnes Deshon Scholarship Fund
Clint & Marge Hawkins Memorial Christian Education Trust
Lawrence & Gracia Herbert Scholarship Fund
David L. Hewitt, Jr. Memorial Scholarship Fund
Merrydelle G. May Perpetual Memorial Fund
Judge Leah B. McCartney Scholarship Fund
Warren J. Meyer Memorial Scholarship Fund
Dale & Patricia Mohler Charitable Fund for Education
Mary Alice Reinhardt Memorial Scholarship Fund
Mildred Willock Scholarship Fund
The William H. & Jo Ann Dinwiddie Education Fund

Foundation Ministry Grants
Anonymous
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
Robert & Velma Felt Memorial Fund
Helen Gibbs Memorial Fund
Alexander & Gilbreath Endowment Fund
Chance Harp Memorial Fund
Ethel K. Hayward Memorial Endowment Fund
Harry & Betty Kishpaugh Memorial Fund
Bates Lohman Memorial Fund
Rev. Keith & Barbara Maxwell Memorial Trust
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

Foundation Seminary Scholarships
Tom Adams Memorial Fund
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
Ruth Felker Sharp 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

Kingswood Manor - Kansas City
Pearle Davis Memorial Fund

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

LifeWise STL
Matt & Sheila Cappello "For Elise & Sam" Fund
Mission & Service St. Louis Fund
Glenna Mae McClain 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

Memorial UMC-Farmington
Dudley D. Pautz Charitable Endowment

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 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
Wipfler Charitable Memorial 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

Nevada UMC
Marvin & Evelyn Emery Memorial Fund

New Awakening UMC
Leander E. & Nellie R. Rossel Perpetual 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

Pathways UMC
Anonymous
Salem F. & Dorothy M. Hagewood
Endowment Fund

Perkins School of Theology - Dallas, TX
Clarence B. & L. Courtney
McOwan Memorial Fund

Potosi UMC
Glenna Mae McClain
Charitable 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 - 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. Luke's UMC - Kansas City
M. Eileen Crabtree Endowment Fund

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

Trinity UMC - Brookfield
Missions Endowment

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

UM General Board of Global Missions
Salem F. & Dorothy M. Hagewood
Endowment Fund

UMCOR
Anonymous
Axthelm Family UMCOR Fund
Blanche Hubbard UMCOR
Endowment Trust
C. Byron & Joyce Gilbreath
Permanent Endowment Fund
Salem F. & Dorothy M. Hagewood
Endowment Fund
Dorothy Schellhase
Permanent Endowment
William & Blanche Simmer
Endowment Fund

UM NOMADS
UM Nomads-Missouri
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

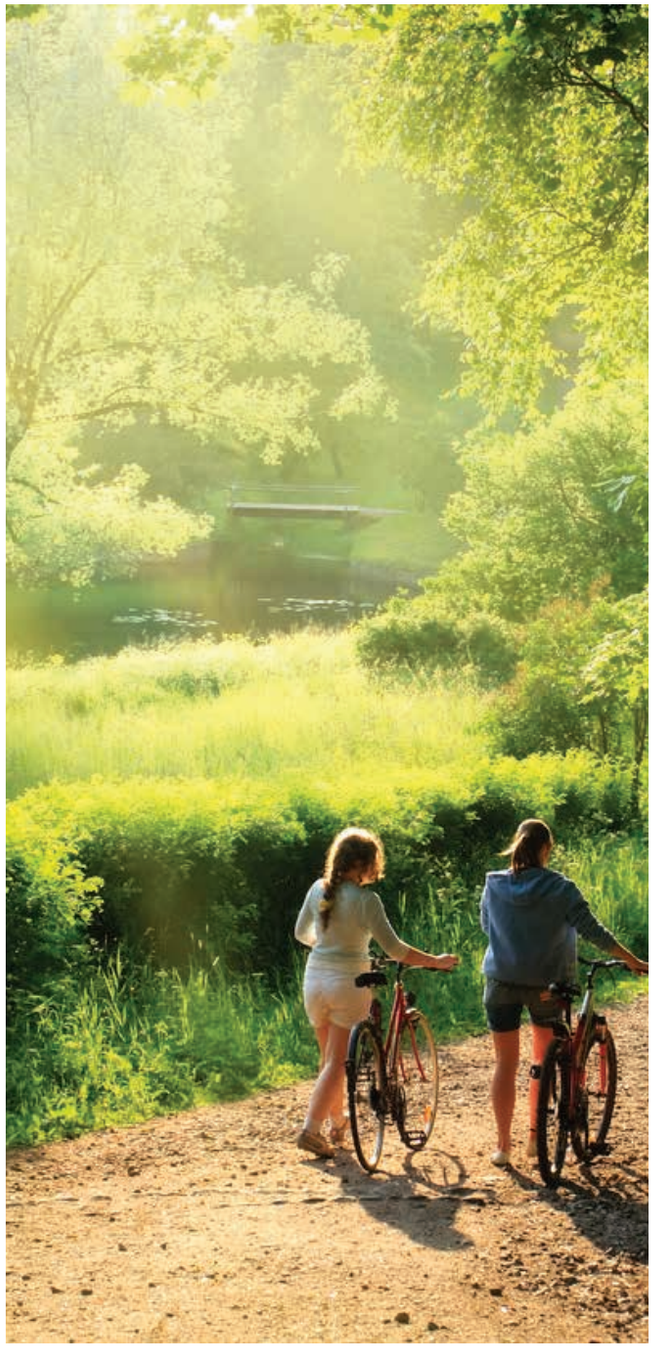
Wesley UMC - Springfield
Margaret Curtis Permanent
Endowment Trust

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



start your legacy today!

There are many ways to start a fund at the Foundation, or to plan to start one in the future.

There are many options:

- A gift of $10,000 is all you need to set up your endowment or designated fund today. Then, you can make contributions to your fund of any size at any time. (Appreciated stock can make a great gift.) We will draft a brief document that describes the purpose of your fund and the terms of administration. (There really is room for creativity!)
- You may want to create a planned gift such as a gift annuity, charitable remainder trust, or donor advised fund that will become an endowment at a later date.
- You may want to include language in your will or trust that creates your endowment. We can offer sample language and prepare a Memorandum of Understanding to keep on file at the Foundation.

step 1

Give us a call. Let's talk about what you have in mind and what might be the best way to get started.

step 2

Follow through. Turn those good intentions into action. The Foundation staff is here to help you turn your charitable vision into reality. Call the office at **573-875-4168** and visit us on the web at **www.mumf.org**.

charitable gift annuities

income for life + gift to your church

A charitable gift annuity can be a great way to benefit your church and/or another favorite charity AND lock in a fixed payment for life. Your Foundation makes it easy to create a gift annuity, provide payments by direct deposit, and distribute your gift as you have directed.

$2,836,454

Total gift annuity asset value, which provided $155,925 in income payments to annuitants in 2021.

Donor Advised Funds

The Foundation manages a growing number of Donor Advised Funds. These handy funds are easy to set up and easy to use. The DAF is a great way to manage all your charitable giving in one convenient place. It's also a tax-wise way to manage charitable deductions.

Charitable Remainder Trusts

There are several ways to use a Charitable Remainder Trust to achieve charitable and other planning goals. The Foundation serves as trustee and administrator for CRTs that include a significant benefit for United Methodist charitable causes.

$31,000
2021 MUMF Named Scholarships (24 students)
$32,000
2021 MUMF Dollars for Scholars match (32 students)

$63,000
total undergraduate awards

connecting across generations

undergraduate

Foundation scholarship funds celebrate life, love, and faith across the generations. Many scholarships bear the name or names of donors, or are memorials created by loved ones to serve as lasting and inspiring legacies. Each award benefits student members of local Missouri UM churches who are pursuing post-secondary education.

The Crossen, Hawkins, Herbert, Hewitt, May, McCartney, Meyer, and Reinhardt scholarships each provide a one-time award for eligible undergraduate students. In addition, the Foundation partners with the UMHEF Dollars for Scholars program to assist dozens of Central Methodist University students each year. (Eligible students can reapply for the Dollars for Scholars award every year.)

seminary students

The Foundation is committed to providing significant financial support for seminary students to ensure that qualified students have adequate resources to answer the call to ministry.

Currently, the Foundation named awards include the Kahrs, Ingles, Herbert and Watts awards. The Excellence in Clergy Leadership award is a matching program in partnership with the General Board of Higher Education and Ministry (GBHEM). The Clergy & Church Financial Ministry (C2FM) is a program of the Foundation providing support to pastors and congregations. C2FM provides a one-time award for eligible students that can lead to an additional grant following appointment to a Missouri church.

$17,250
2021 MUMF Seminary Scholars Grants
$18,000
2021 MUMF Excellence in Clergy Leadership
$22,500
2021 MUMF Named awards

$9,000
2021 MUMF Dollars for Scholars match
$5,000
2021 C2FM Scholarships

$71,750

total seminary awards

$944,000

Committed for 16 Fellows since 2014

fellowships

"The Foundation trustees continue to place a high priority on pastoral leadership development and support," states David Atkins, Foundation president, "and the Missouri Conference Fellows program has become an essential part of the leadership development 'eco-system' within our conference."

Fellows are usually early-career pastors whose personal strengths and interests are a good fit for one of Missouri's larger congregations. The host congregation plays a vital part in mentoring the Fellow in all aspects of local church ministries and operations. The goal of the fellowship is to prepare the participants to lead in Missouri's new church plants and/or larger established congregations, and that goal is already being realized.

The program is a partnership between the MOAC Centers for Leadership and Congregational Excellence, the Foundation, and the local host congregations. The cost of the compensation package for each Fellow is shared by the Conference, the Foundation, and the host church over the two-year fellowship.

Two fellows are selected each year for a two-year residency. Interested pastors and prospective host churches should contact the MOAC Office of Leadership Excellence for more information.

missouri
united methodist
foundation

multiplying the talents

investing resources for ministry

The Foundation was created to serve the needs of all our congregations and related agencies. A key part of that service is providing a cost-effective, prudently structured, and professionally monitored investment program for church assets.

Local church leaders and volunteers appreciate the ready access to funds, the back-office support, and the outstanding long-term track record the Foundation investment program provides. Furthermore, the assets are monitored, and many are actively screened in keeping with the United Methodist Social Principles.

$83,630,039

Market value of investment accounts owned by 190 Missouri United Methodist churches and 34 UM institutions & agencies

$1,745,919

Total value of stock gifts processed in 2021. The annual average over the last five years is in excess of $1 million per year.

we process stock gifts - for all

More people than ever own shares of stocks or mutual funds. Appreciated shares (shares worth more today than when purchased) make a great charitable gift! By giving the shares to church/charity, you avoid the capital gains tax. The result is a bigger gift in support of your favorite ministry.

problem

Many local churches cannot easily process such gifts.

solution

Your Foundation operates a simple pass-through service for all our churches, agencies, and donors. There is no added fee for this service. The shares are sold at cost, the donor receives a timely gift receipt letter, and the net proceeds go to the church or organization named by the donor with a full accounting of the transaction.

three simple steps

step 1

Complete the MUMF Stock Gift Transfer form. (Download the form from the MUMF website or call and request a copy from the MUMF office. Call us if you have questions at 573-875-4168.)

step 2

Give the completed form to your broker or account administrator AND send a copy to the Foundation.

step 3

Keep your gift receipt letter that you receive from the Foundation with your records for tax reporting purposes.

Rev. Laura Murphy
Director of Development

“putting your house in order”

a timely workshop for you and your church

End-of-life planning can be emotional and difficult for individuals and families, but lack of planning causes untold heartache for too many in our congregations and communities.

To be sure you are well prepared, the Missouri United Methodist Foundation offers a workshop called “Putting Your House in Order” (PYHIO) to help folks organize and plan for the present and the future.

Highlights include:

- A complimentary PYHIO binder for each attendee filled with information, checklists, and easy-to-use forms for gathering all the key information and for recording – not just the facts – but your intentions, hopes, and values.
- An experienced guide. Rev. Laura Murphy introduces topics, offers personal experiences, and shares helpful insights from her professional career as a pastor and as the Foundation Director of Development.

"My goal is to help dispel some of the mystery and fear around end-of-life issues, and to highlight what a beautiful gift this can be for loved ones," says Murphy. "It can bring peace and restoration to your relationships: Your relationship with God, your relationship with your family and loved ones, and your relationship with the "stuff" that has been accumulated throughout a lifetime."

Murphy presents the material with a pastor's heart, as well as the life experience of a daughter, spouse, mother, and friend. As she states, "God admonished King Hezekiah long ago to put his house in order – and the King still procrastinated! We are just trying to walk with folks and help them discover the real joy, satisfaction, and meaningful legacies that can flow from this sort of planning and organization."

If you'd like to learn more or to schedule a PYHIO workshop for a group of any size at your church, or to set up a time to walk through the PYHIO materials one-on-one, contact Laura Murphy at lmurphy@mumf.org or 573-875-4168. Online sessions of the PYHIO workshop are offered quarterly. (This is a good opportunity for leaders to check it out and see if you want to host a live workshop for your congregation.) Check out on-line workshop dates and registration at www.mumf.org/events .

in memorium: John R. Lewis, Sr.

The Foundation lost a great friend and leader late in the year 2020. John R. Lewis, Sr., was a devoted lay leader and member of the King's Way United Methodist Church for nearly 60 years. An accomplished attorney and civic leader, John graced the Foundation with his wisdom and good cheer for nine years, five of those as President of the board. He was a great believer in the mission of the Foundation and encouraged wide use of its planned giving services within his congregation. John's memory is cherished by a wide circle of family, friends and colleagues.

Bishop Eugene Frank with Byron Gilbreath

in memorium: Reverend C. Byron Gilbreath

In January of 2021, the Foundation lost a friend, colleague, and loyal supporter. Reverend C. Byron Gilbreath answered God's call to ministry after returning home to Carthage following military service in Korea where he earned the bronze star. He received his Master of Divinity degree from Saint Paul School of Theology and pastored churches across the western side of the state, including a stint as a District Superintendent in the former Springfield District. Following his retirement from pastoral ministry, Byron found a new field of service as an Associate Director and west-side field representative for the Missouri United Methodist Foundation (1995-2003). Byron was a tireless ambassador for the Foundation, assisting churches and donors to create charitable funds and even creating a couple of Gilbreath endowments that support the work of the Foundation and the United Methodist Committee on Relief (UMCOR). Byron departed this world at age 92, leaving rich legacies of love and faith among his family and friends.

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Rev. Mark Struckhoff
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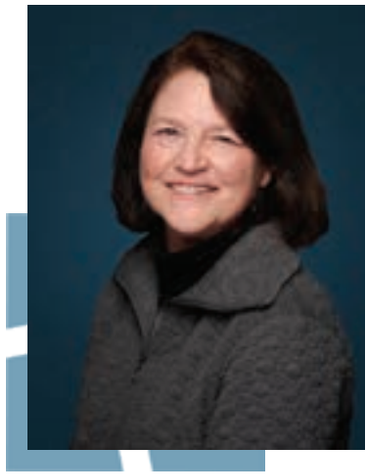

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