

ALABAMA-WEST FLORIDA UNITED UNITED METHODIST FOUNDATION

PLANNED GIVING HANDBOOK



THE CHURCH ETERNAL

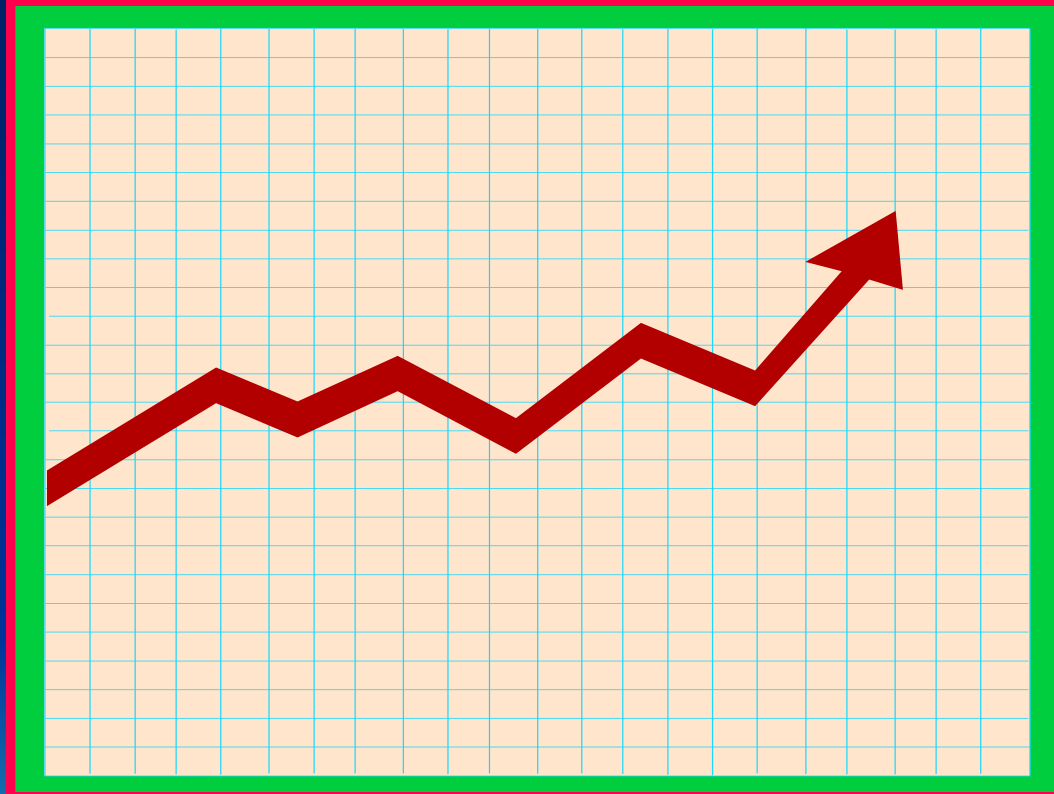
“Dearly beloved, the Church is of God and will be preserved to the end of time”



**Yet far too often, Churches
take the short-term view**



ANNUAL BUDGET SETS OUR TIME HORIZON



Christian Stewardship

- Our most important act of stewardship is the final distribution of our life's accumulation.
- How we distribute our estate our estate speaks volumes about our values and our concerns for our loved ones.
- Everyone should have a written PLAN.



\$41,000,000,000,000

Inheritances over next 50 years

Estimate 10% to religious institutions

Good planned giving program crucial



DEVELOPING LONG-RANGE PLANNING

Three-year pledges
for a capital fund
drive is a beginning



WHAT ABOUT A PERMANENT ENDOWMENT FUND?



- Permanent Gift
- Only earnings spent
- Donors interests reflected
- Enhances ministry & outreach of church

ENDOWMENT PROGRAM AS AN ONGOING PART OF STEWARDSHIP PROGRAM

- A way to invite donors to give to something they know will last



SET POLICIES EARLY

**Local boards of trustees
and Endowment committees
recommend fund policies**

**Charge Conference approves
establishment of the fund**



CONSIDER THREE ENDOWMENTS



Property Maintenance

Missions

General Endowment

PROPERTY MAINTENANCE

- Take care of what we already have
- Improve and construct what we will need in the years ahead



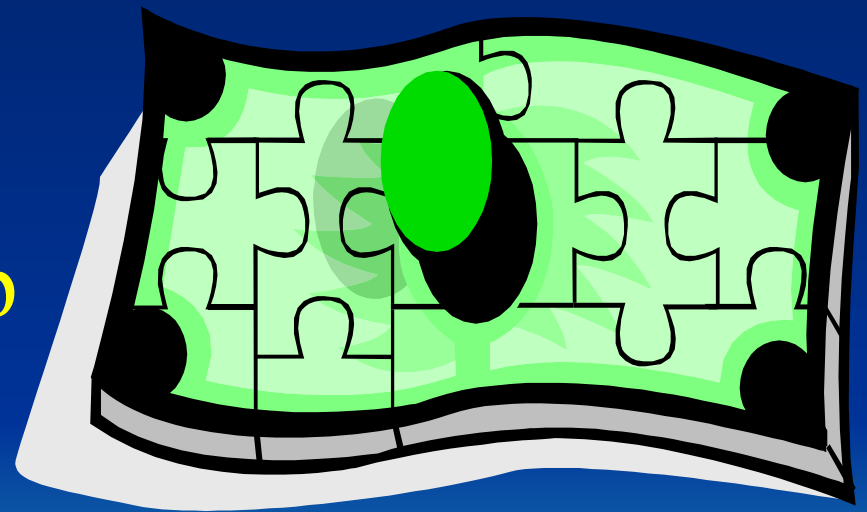
MISSIONS

- Offer Christ beyond the doors of our church
- Expand outreach of church's ministry



GENERAL ENDOWMENT

- For special needs as they arise
- Approved by leadership
- Start new programs



EXPAND GIVING POSSIBILITIES

- Allows giving from “two pockets”
- Helps people think about stewardship
- Establishes another stream of income



HELP DONORS ACHIEVE THEIR GOALS

- Life Income
- Family support
- Charitable provisions



WHY THE IMPORTANCE?

Why an Endowment Fund ?

1 ½ to 2 % of UMs die each year

Yet very few of our UM churches
receive planned gifts on regular basis



HOW DOES THE FOUNDATION HELP?

- Plants seeds through education
- Helps organize committee and a charter
- Provides ideas & resources
- Provides technical assistance to donors and the committee



HOW DO WE START?

**Invite a representative from
your Alabama-West Florida
United Methodist Foundation
to visit your church.**



For Success in a Local Church Endowment Program Members Should....

- Understand & support the vision for mission & ministry.
- Know about opportunities for giving.
- Understand the benefits of creative gift planning options.
- Be given clearly defined & repeated opportunities to participate in the program.
- Repeat efforts on a regular basis.



PROMOTIONAL PLAN

- Education of leaders
- Promotional mailings
- News items
- Special programs
- Observances
- Acknowledging donors



Charitable Gift Planning

- Cash
- Appreciated securities
- Bequests
- Real estate
- Personal property
- Life insurance
- Life income plans



WHAT ARE THE RESULTS?

“... Church will
be preserved to the
end of time.”



Alabama-West Florida
United Methodist Foundation
Terri H. Turner

- Thank you for your attendance. I can be reached at (334)793-6820 or you may visit our website at alwfumf.org .

