

The Alabama - West Florida United Methodist Foundation (ALWFUMF)

Our mission is to encourage generosity as a way of life, foster planned giving, develop successful planned giving programs, and manage funds in order to strengthen the work of Christ's church. Our AWF Development Fund also supports church growth by providing loan services for building, renovating, or purchasing property.

Our purpose is to help individuals and the church by encouraging generosity through education, consulting, development, and financial services.

Services

AWF Development Fund Services:

- Loans (4.0% rate)
- Deposit Accounts for individuals and churches (1.5% rate)

Foundation Services:

- Generosity Development/ Workshops
- Consulting
- Fund Administration
- Investment Services
- Church Planned Giving Programs
- Digital and Printable Resources
- Marketing Resources
- Quarterly Newsletters
- Monthly Eblasts

UNITED METHODIST
DEVELOPMENT
FUND

ALABAMA • WEST FLORIDA

Generosity Matters

"Giving, not getting, is the way. Generosity begets generosity." Luke 6:38 (MSG)

A PUBLICATION OF THE ALABAMA - WEST FLORIDA
UNITED METHODIST FOUNDATION | SUMMER 2018

Charitable Gift Annuity Rates Become More Attractive as of July 2018

| One Person | | Two People | | |
|------------|------|-------------|-----------|------|
| Age | Rate | Younger Age | Older Age | Rate |
| 60 | 4.7% | 65 | 67-68 | 4.6% |
| 63 | 4.9% | 67 | 73-77 | 5.0% |
| 65 | 5.1% | 69 | 77-95+ | 5.2% |
| 67 | 5.3% | 71 | 76-78 | 5.3% |
| 69 | 5.4% | 73 | 75-77 | 5.4% |
| 71 | 5.7% | 75 | 79-80 | 5.7% |
| 73 | 5.9% | 77 | 81-82 | 6.0% |
| 75 | 6.2% | 79 | 84 | 6.4% |
| 77 | 6.6% | 81 | 85-86 | 6.8% |
| 79 | 7.1% | 83 | 85 | 7.1% |
| 81 | 7.5% | 85 | 87 | 7.6% |
| 83 | 7.9% | 87 | 89 | 8.3% |
| 85 | 8.3% | 89 | 90 | 8.9% |
| 87 | 8.7% | 91 | 91-95+ | 9.3% |
| 89 | 9.2% | | | |
| 90+ | 9.5% | | | |

Rates as of July 2018.
Please verify current rates.

Giving is not only an important way to support the ministry and mission God gave the church, but it is also an essential part of our growth as followers of God. To aid in that growth, there are many opportunities and options available when thinking about making a planned gift; one great option to consider is creating a charitable gift annuity.

The return rates of charitable gift annuities increased July 1, 2018, which high-

lights them as an even better gift option to consider for both you and those who will benefit from it.

Gift annuities are created with a permanent transfer of cash or property to a church or charity in return for providing fixed annual payments. Married couples can even create a gift annuity that will provide for them while they are living and continues to support the surviving spouse after the other's death. With the new 2018 rates, the payments you receive will increase making these gifts a great option.

Benefits of a Charitable Gift Annuity

- Designate future support for your United Methodist church or other charities, programs, or institutions
- Receive a current income tax deduction
- Receive annuity payments for life with a portion being tax-free
- Avoid a portion of capital gains tax when funding a gift annuity with appreciated stock
- Receive rates, determined by your age, when the gift is created; these rates will not change
- Increase present cash flow depending on your age

If you would like a free personalized illustration of the payout and tax benefits for a charitable gift annuity, call us at 334-793-6820 or email us at foundation@alwfumf.org.

Connect with us

TIPS • TOOLS • RESOURCES

Find us on  @ALWFUMF



From the Executive Director



Terri Turner, Executive Director

In my work with the **Foundation**, I am constantly blessed to have the opportunity to meet with our local church leaders and pastors inside their communities. I am always so impressed with how much these churches are able to do with often limited resources while relying on their visions and

a determination to make disciples of Jesus Christ for the transformation of the world. This passion to fulfill the Great Commission is the fuel for our **Foundation's** desire to consult, teach, finance, and invest in order to foster growth and provide additional resources needed to make these ministry visions a reality.

As partners in ministry, the **United Methodist Foundation** hears your worries during times of uncertainty in both the Church and the world. For almost forty years, since our founding in 1979, we have continued to make changes to the services we provide in order to address your changing needs in ministry. For example, when the **Foundation** was starting, digital marketing wasn't available, so we offered printed materials, but today we provide an entire Planned Giving Marketing Handbook that is available

through email to encourage generosity in your ministry.

Change and fluctuations are a regular part of the life of the **Foundation**, but our growth in investment partnerships has continued to multiply. To date you have entrusted us with approximately \$90 million of your vital financial resources. We are grateful for the trust you have placed in the **Foundation** and your continued good stewardship. Your support allows us to continue this ministry of generosity and share in the common mission of our annual conference. As we have grown and changed, our mission has remained the same: to encourage generosity as a way of life and provide services that strengthen the work of Christ's church.

Terri Turner, Executive Director

2017 Affiliated Churches of the Alabama-West Florida United Methodist Foundation

The Foundation

Churches and agencies with managed funds through the **Foundation**, including planned giving programs, are identified by the red dots on the map.

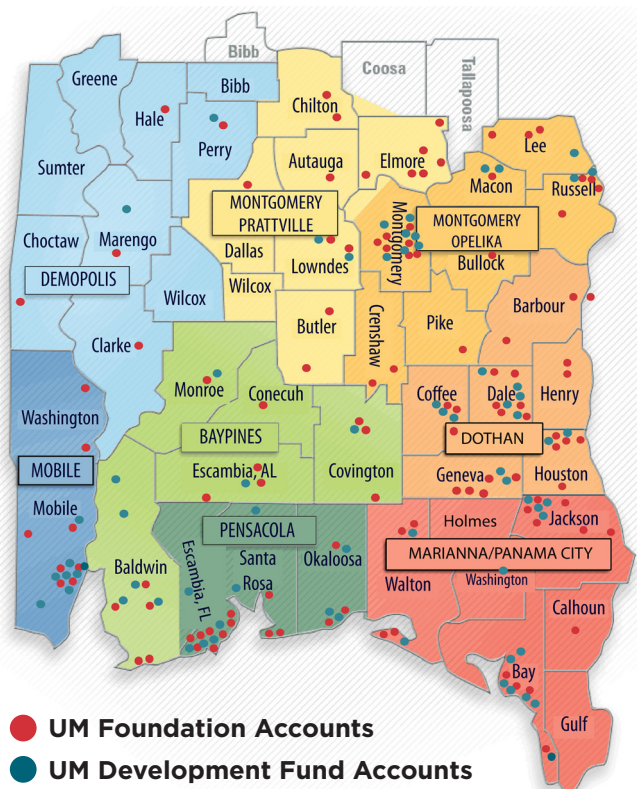
The goal of the **Foundation** is to provide financial services that encourage good stewardship of resources and to assist AWF Conference churches and agencies with the ever growing needs of ministry. We offer professional services to set up, facilitate, and manage planned giving programs in the church.

The AWF Development Fund

Churches and agencies with either a loan from or a deposit account with the **AWF Development Fund** are identified by the blue dots on the map.

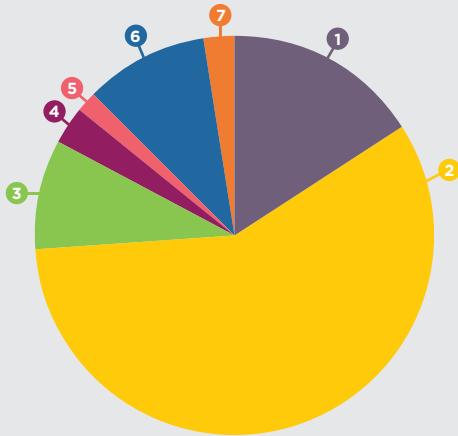
Deposit Accounts - United Methodist individuals, churches, and agencies can deposit funds into savings through the **AWF Development Fund** and earn interest while helping other AWF Conference churches and agencies get needed loans at affordable rates of interest. This is a great way to invest in the future of the church without making a donation.

Loans - Loans are up to \$1 million, have affordable interest rates, and are used for purchasing property, building expansion, and major renovation projects.



2017 Annual Report

Assets Held by the Foundation



1. Local Church & Agency Permanent Funds
\$14,162,946

2. Local Church & Agency Managed Funds
\$56,269,731

3. Scholarship Funds
\$7,258,258

4. Charitable Remainder Trusts
\$1,837,920

5. Charitable Gift Annuities
\$299,046

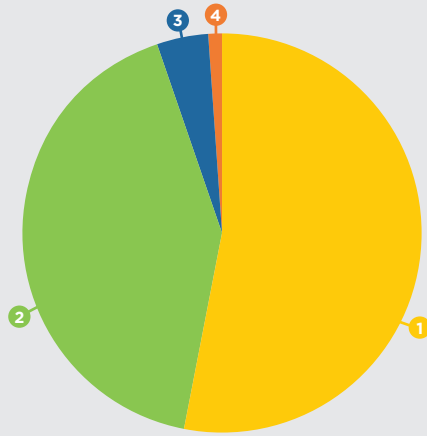
6. AWF Development Fund
\$8,834,402

7. Foundation Assets
\$1,315,879

Total 2017 Assets
\$89,978,181

Current Assets
\$91,115,352

Contributions and Earnings



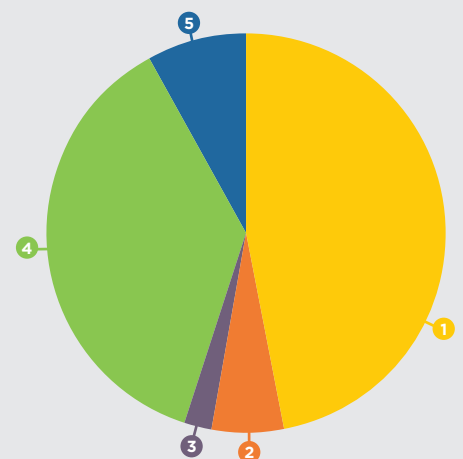
1. Contributions to New and Existing Accounts
\$4,207,478

2. Investment Income for Local Churches, Agencies, Scholarships, CRTs, and Annuities
\$3,230,151

3. AWF Development Fund Income
\$233,329

4. Foundation Investment Income
\$33,018

Funds Distributed



1. Local Church, Conference, and Agency Funds
\$2,133,590

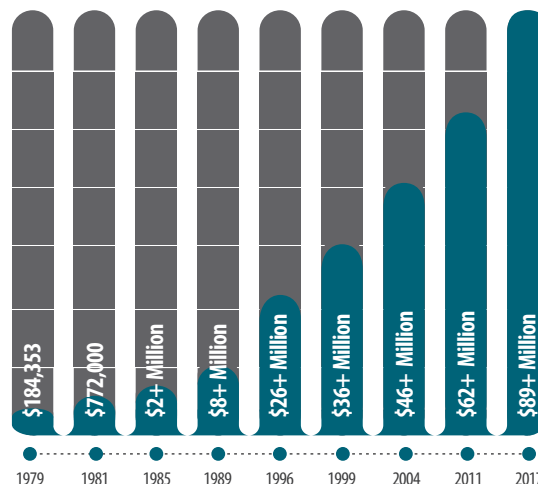
2. Scholarships
\$310,693

3. Life Income Payments to Donors
\$173,595

4. AWF Development Fund Distributions
\$1,799,053

5. Foundation Operating Budget
\$420,417

Total Assets by Year



Since 1979 the **Foundation** has continued to be blessed by a dedicated Board of Directors and staff who are passionate about its ministry and mission.

Our mission is to encourage generosity as a way of life, foster planned giving, develop successful planned giving programs, and manage funds in order to strengthen the work of Christ's church.



Join our email list for more resources to help your church!
Email foundation@alwfmf.org or scan the QR code on the right.



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Spring Board Meeting
at Dothan FUMC



Printable Newsletter

Be sure to display our newsletter in your church to promote generosity and watch your email for a printable version. To sign up for our digital newsletter, please email foundation@alwfumf.org.

Find us on  **ALWFUMF**



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Spring Board Meeting at Dothan FUMC



The Spring 2018 Board of Directors meeting for the **Foundation** was held May 23 at Dothan FUMC. After meetings for both the Executive Committee and the Board of Directors, a luncheon was held for the attendees. Bishop David Graves graciously blessed the food before a time of fellowship.

Exciting projects are on the horizon for this ministry of generosity, including the **Foundation's** 40th Anniversary in 2019.

While many great things are to come, we are also saddened to say goodbye to long-time board member Her-

bert Barr. Barr has been on the **Foundation** board since 2004 and has led our audit team with great insight and wisdom.

Thank you to our wonderful board of directors, our president Ross Cotter, and Bishop David Graves for making our Spring Board Meeting a success!

