

**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**

**Foundation Services:**

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

**AWF Development Fund  
Services:**

- Loans (4.25% rate)
- Deposit Accounts for Individuals and Churches (1.75% rate)

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 | SPRING 2019

## Celebrating 40 Years of Ministry



UNITED METHODIST  
**FOUNDATION**  
ALABAMA • WEST FLORIDA

*"Give, and you will receive. Your gift will return to you in full—pressed down, shaken together to make room for more, running over, and poured into your lap. The amount you give will determine the amount you get back." Luke 6:38 (NLT)*

2019 marks a significant milestone for the Foundation as we enter into our **40th year of ministry** with the Alabama-West Florida Conference. We welcome you to join us in celebrating this milestone anniversary!

Our mission is to encourage generosity as a way of life, foster planned giving, develop successful endowment programs, and manage funds to strengthen the work of Christ's church. We view everything we do as a ministry of generosity, and our goal as an AWF

Conference agency is to see lives changed, generosity increased, churches grow, and ministries expand. **We are in the transformational, not transactional, business.**

The vision for a **United Methodist Foundation** in the AWF Conference started among a group of dedicated United Methodist men and women under the leadership of Bishop Carl Sanders. The dream was for an agency that would bridge the gap between the mission and financial needs of the church both presently and into the future. January 11, 1979, this dream for a Foundation became a reality, and the **Alabama-West Florida United Methodist Foundation** was born. Passionate about the Foundation and its ministry, the founding members each pledged to give \$5,000 in seed money over the course of 5 years to help start its work.

With a board of directors, leadership in **Continued on page 2**



**Bishop Carl Sanders (left), Harry P. Hall, and James Y. Carroll at the 1979 Foundation organizational meeting.**

*Follow us on Facebook!*

DAILY TIPS, INSPIRATION,  
AND RESOURCES

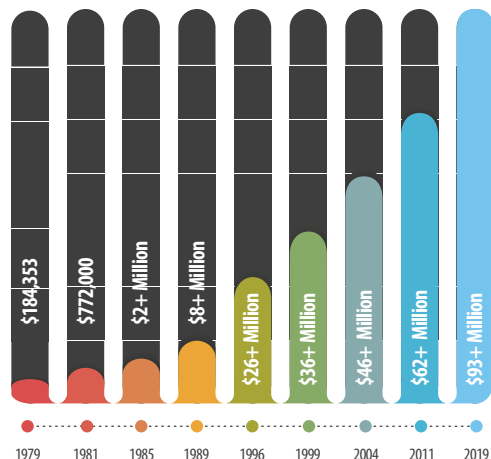
 [Facebook.com/ALWFUMF](https://www.facebook.com/ALWFUMF)





1979 Foundation organizational meeting

place, and assets totaling \$184,353, the first Foundation office was opened in downtown Dothan, Alabama June of 1979. The board of directors and staff worked tirelessly to spread the word about the Foundation, and as a testament to its success James Y. Carroll, referring to the 1980 financial report, stated: **“great things have**



**been happening, but this is only the beginning.”** By 1981 the Foundation already had deposits from twenty-nine churches, two districts, and several AWF Conference agencies totaling \$772,000.

Before 1991 the Foundation had met its goals to raise \$10 million in assets, be one of the few self-sustaining Foundations in the country, and was

ranked in the top 20% of all United Methodist Foundations in terms of assets under management.

Word about the Foundation continued to spread, and its services continued to evolve to include the creation of printed resources for churches on financial and estate planning (2002), the creation of a Foundation website (2003), and the addition of the charitable gift annuity as a new way for donors to give (2006).

Under the leadership of the founding board of directors, the Foundation flourished. Since 1979 directors have followed in the footsteps of the founding members with their dedication and passion for the Foundation's ministry. The work of the Foundation truly is “a ministry of generosity,” and we owe a debt of gratitude to all who have had a hand in the Foundation's work (Aubrey Stabler, President 2015-2017).

Through the years the mission of the Foundation has remained the same, but our services have grown and expanded to better serve our Conference. We now cover a variety of financial planning and stewardship areas that include the Planned Giving Program, investment management services, administration services that include digital records for quickly helping our partners, access to

## 1979 Founding Board of Directors

### Lay Directors

Harry P. Hall, President  
 Ed Woods, Vice-President  
 James Y. Carroll,  
 Secretary-Treasurer  
 Ralph Adams  
 Wilfred T. Benson  
 James C. Bledsoe  
 W.S. Brewbaker  
 Amanda Burton  
 Ben R. Byrd  
 Foy Campbell  
 Kenneth Cooper  
 Bracey H. Cross  
 J. Ralph Dickert  
 A. Preston Hood  
 Louis L. Johnson  
 Virginia King  
 James E. Ladner  
 Alice Lee  
 Alto V. Lee, III  
 Clyde P. Mahaffey  
 Dorothy Mahaffey  
 Frank C. Martin  
 C.H. McGehee  
 Charles H. Newsom  
 M.D. Nolen, Jr.  
 K.T. Riley  
 James J. Rutherford  
 Cecil C. Spears, Jr.  
 C.E. Thomas  
 Albert M. Thompson  
 Calvin L. Todd  
 Charles G. Tomberlin  
 W.K. Upchurch, Jr.  
 Katherine Walden  
 J.E. Waller  
 Charles S. Weeks  
 Don Wyatt

### District Superintendents

Robert Collins  
 Paul Duffey  
 Henry Eddins  
 John O. Ellisor  
 Floyd C. Enfinger  
 Lloyd Kimbrough  
 Rex Mixon  
 Lester Spencer  
 John E. Vickers



# Celebrating 40 Years of Ministry



**Frank Martin (left), Lois Martin, Eloise Martin, Averett Hale, and Wray Tomlin**

online statements, free marketing resources and generosity workshops, scholarship and building funds, and assisting donors and their advisors in completing various types of gifts. These services are effective in providing good management of funds; however, our primary goal is to give you, as leaders in the church, every advantage in growing generous givers.

With the generosity of donors, churches, and agencies, the Foundation is blessed to currently



**April 2000 New Foundation Building  
Helen Jones (left) and Terri Turner**

manage over \$93 million in assets and has been able to return \$85 million back into the AWF Conference since 1979. These funds are helping to support ministry and transform lives in their communities, in the Conference, and beyond.

**“This is a ministry of generosity.”**

— Aubrey Stabler, Foundation President (2015-2017)

The ministry, services, and work of the Foundation would not be possible without the support of the AWF Conference, the Foundation board of directors, donors, pastors, professional advisors, and the churches and agencies within the AWF Conference. We are grateful for the vision and commitment of our board of directors, past and present, and look forward to what God will do through the Foundation in the years to come. Thank you!



**District Superintendents: Rev. Ed Sells (left), Rev. Walter Ellisor, Kent Hall, and Rev. Langdon Garrison**

## Alabama-West Florida United Methodist Foundation Ministries

### CHURCH PLANNED GIVING PROGRAMS

Planned giving programs help encourage and facilitate planned gifts and endowments to the church. We offer a step-by-step guide designed to encourage and support future financial needs of the church.

### FUND ADMINISTRATION SERVICES

We provide trust fund accounting, regular disbursements, and all other fiduciary administration services. This information is reported to you on easy to read statements.

### GENEROSITY DEVELOPMENT/WORKSHOPS

We offer generosity development through educational programs that foster a better understanding of giving and stewardship as both an act of worship and discipleship.

### INVESTMENT SERVICES

Our investment services are uniquely created for managing church and agency funds. The Foundation staff assists in developing a custom investment plan for each participating organization or donor.

## Foundation Timeline

<b>1978</b>	36 lay directors pledge \$5,000 in financial support to assure operations for the first five years	<b>1978</b>	The Foundation is approved as an agency at AWF Annual Conference
<b>1979</b>	The Foundation begins and the first office opens June 11 Downtown Dothan	<b>1979</b>	Bishop Carl Sanders hired as the first Executive Director
<b>1981</b>	Assets total \$772,000	<b>1980</b>	The Foundation issues its first loans (before the start of the Development Fund) and is named executor of two couples' wills
<b>1983</b>	The Scholarship Committee begins	<b>1984</b>	The Foundation is approved to establish the Development Fund
<b>1985</b>	Rev. Dan Bailey is hired as Executive Director	<b>1985</b>	The Foundation purchases its first computer
<b>1986</b>	The Foundation's first newsletter is published	<b>1986</b>	A committee is formed to begin work on an Endowment Program for the Foundation
<b>1990</b>	\$10 million in assets reached	<b>1988</b>	The Foundation begins to pool accounts to achieve better income earnings
<b>1991</b>	Terri Turner is named the Foundation's Executive Director	<b>1991</b>	The Foundation ranks in the top 20% of all UM Foundations in assets under management
<b>1993</b>	The Foundation becomes one of the few self-supporting Foundations in the country	<b>1996</b>	A promotional video is created as an introduction to Foundation's services
<b>1997</b>	A scholarship trust is created by the Foundation board to benefit ministerial students	<b>1998</b>	The Foundation is Nationally ranked as the 13th largest Foundation in 42 states
<b>2000</b>	Foundation moves to current building on Belmont Drive	<b>2003</b>	Foundation website is created
<b>2006</b>	Charitable Gift Annuities added as a gift type	<b>2009</b>	Foundation's 30th Anniversary: Serving approx. 557 churches, agencies, and individuals
<b>2012</b>	Administrative Assistant Helen Jones retires after 27 years	<b>2015</b>	Online access to accounts and statements becomes available through the Foundation website
<b>2016</b>	Foundation logo and website are redesigned	<b>2017</b>	The Foundation brochures are redesigned and the Planned Giving Program Marketing Kit is released
<b>2018</b>	The Foundation board votes to start a grant program for Foundation partners and applies for it's own 501(c)3	<b>2018</b>	After Hurricane Michael, the Foundation and Development Fund boards donate funds for relief efforts
<b>2019</b>	Foundation receives Lilly Grant to develop financial literacy events	<b>2019</b>	Game Changing Generosity events aimed at fostering a generous culture in churches
<b>2019</b>	Foundation's 40th Anniversary; assets reach \$93 million		



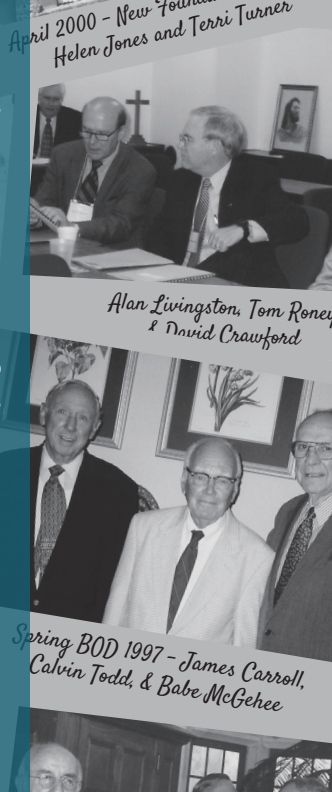
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**Celebrating 40 Years  
of Ministry**

**Game Changing  
Generosity  
Conference-Wide Events**

**Read on the Go!**

Sign up for our digital  
newsletter by emailing  
[foundation@alwfmf.org](mailto:foundation@alwfmf.org).



April 2000 - New Founders  
Helen Jones and Terri Turner

Alan Livingston, Tom Roney  
& David Crawford

Spring BOD 1997 - James Carroll,  
Calvin Todd, & Babe McGehee



Frank Martin, Lois Martin,  
Eloise Martin, & August Martin



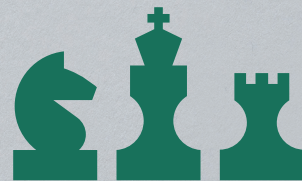
## Alabama-West Florida United Methodist Foundation

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Cecil Speer, Alan Jackson,  
& Harry Hall



## Game Changing Generosity

*Simple strategies you can put into place RIGHT NOW  
to foster a generous culture in your church.*

**Conference-wide  
Seminars  
Coming Soon!**

This webinar is for Pastors, Executive Pastors, Associate Pastors, and Financial Administrators.

Provided by:



Learn more by emailing [foundation@alwfumf.org](mailto:foundation@alwfumf.org) or  
visiting [www.alwfumf.org/Game-Changing-Generosity](http://www.alwfumf.org/Game-Changing-Generosity)



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