

**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 | SUMMER 2019

Celebrating a Milestone



40th Anniversary Luncheon

2019 marks a significant milestone for the Foundation as we enter into our 40th year of ministry with the Alabama-West Florida Conference.

As part of this celebration, we invited past and present Foundation and Development Fund board members, spouses, and staff to a luncheon at Arrowhead Country Club in Montgomery, Alabama on May 24. The luncheon began immediately following our Spring 2019 Board Meeting, and we were blessed to have

Continued on page 4

To view the Foundation's 40th Anniversary website and photo albums, visit our website or scan the QR code below.



www.alwfumf.org/foundation-timeline

— A locally based active partner in ministry —

We not only celebrate your church's gifts but also help in your church's time of need.



From the Executive Director



Terri Turner, Executive Director

For 40 years, your United Methodist Foundation has served the churches and organizations of the Alabama-West Florida Conference with the goal to financially strengthen and preserve ministries during the changing seasons of the Church. Regardless of any changes that may come your

investments will remain secure, and we will continue to provide services to Methodist and historically Methodist churches, institutions, and individuals as we have done since 1979.

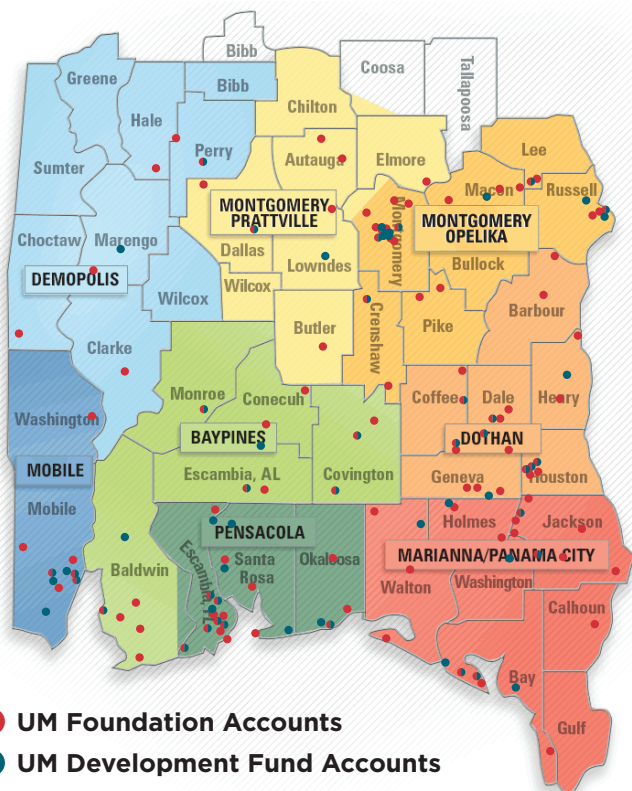
We have been blessed for over 40 years to share in your successes and in your struggles while providing financial vehicles and resources designed to help fund your ministry. We have been a part of your meetings and charge conferences to discuss how we can do more with our collective resources as well as how to facilitate and encourage the generosity of God's gifts. Our ultimate goal is always to partner with you; helping you grow and sustain disciple-making ministries. This Annual Report highlights our 40 years of service and upcoming clergy seminars on September 5th and 6th.

For 40 years, we have offered services to all churches, large and small, through first mortgage loans, fund management with socially responsible investment options, local church endowment training, generosity and financial planning workshops, scholarships, and face to face meetings with donors and/or church leaders in creating a legacy.

On behalf of the Foundation staff and our past and present Board of Directors, it is an honor to serve you through the Foundation's unique financial ministry. We send our heartfelt thanks to those hundreds of churches, donors, and organizations who partner with us in building His kingdom.

Terri H. Turner, Executive Director

Serving Methodist and Historically Methodist Churches, Ministries, and Agencies of the AWF Conference



Several churches and institutions throughout the AWF Conference have voiced concerns about the Foundation's ability to manage funds and provide services with the recent uncertainties. Regardless of any changes that may come we would like to reassure you that you can continue to count on the Foundation for:

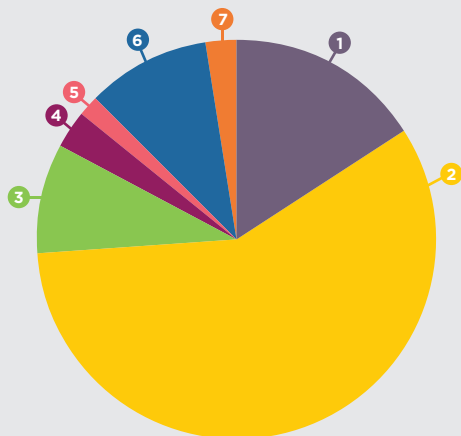
- **Our mission remains the same.** We will continue to provide services to Methodist and historically Methodist churches, institutions, and individuals as we have done since 1979.
- **Investment security.** Decisions will not impact any church's ability to utilize the Foundation and its services. We have not made any changes to our bylaws and are obtaining our own 501(c)(3) to continue to serve you no matter what happens in the future.
- **Contingency options.** When setting up planned gifts through the Foundation that support churches and ministries, you have the ability to set up contingencies and secondary beneficiaries.

The Foundation staff and Board of Directors are continuing to pray for the United Methodist Church, and we invite you to join us in prayer for the future of the church as well.

If you have any questions, please contact Terri Turner at 334-793-6820 or foundation@alwfmf.org.

2018 Annual Report

Assets Held by the Foundation



1. Local Church & Agency Permanent Funds
\$13,442,964

2. Local Church & Agency Managed Funds
\$53,987,402

3. Scholarship Funds
\$6,931,129

4. Charitable Remainder Trusts
\$1,489,122

5. Charitable Gift Annuities
\$254,667

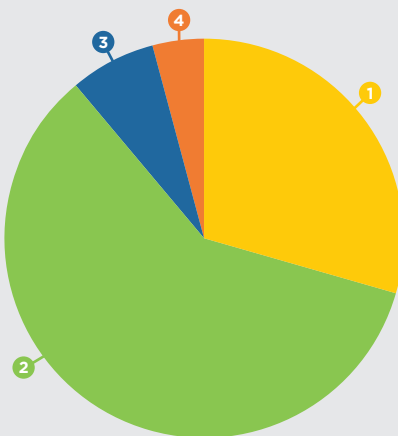
6. AWF Development Fund
\$8,485,783

7. Foundation Assets
\$1,452,696

Total 2018 Assets
\$91,115,352

Current Assets
\$94,042,980

Contributions and Earnings



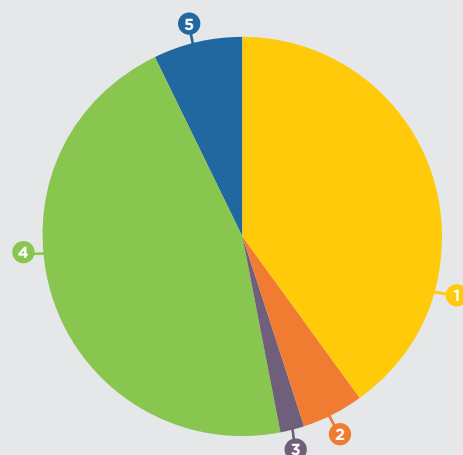
1. Contributions to New and Existing Accounts
\$1,839,670

2. Investment Income for Local Churches, Agencies, Scholarships, CRTs, and Annuities
\$4,478,529

3. AWF Development Fund Income
\$245,433

4. Foundation Investment Income
\$45,452

Funds Distributed



1. Local Church, Conference, and Agency Funds
\$1,800,535

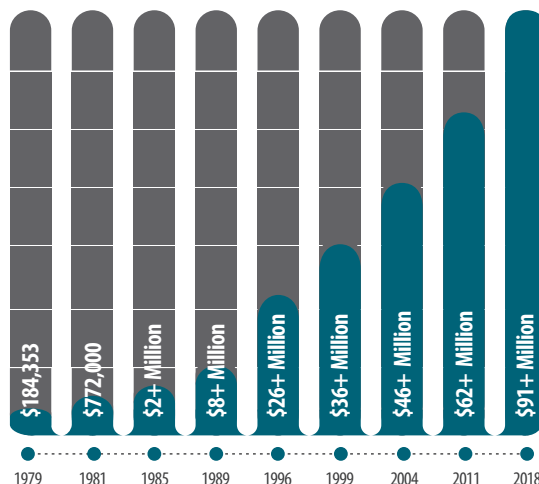
2. Scholarships
\$369,830

3. Life Income Payments to Donors
\$162,265

4. AWF Development Fund Distributions
\$2,524,421

5. Foundation Operating Budget
\$436,413

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.





*"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)

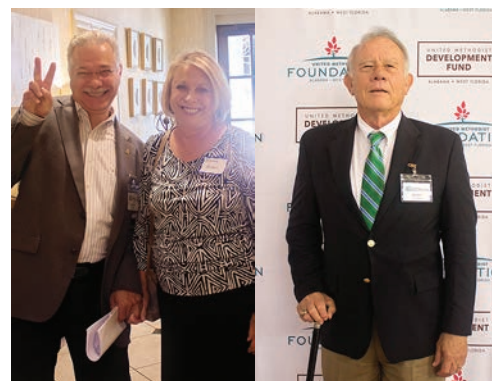
many familiar faces in attendance and were able to honor several guests including Dan Nolen, one of a few surviving founding board members; Bishop David Graves, who graciously blessed our meal; and Dan Bailey, guest speaker and Executive Director of the Foundation from 1985-1991.

fellowship, celebration, remembering where the Foundation has been, and looking forward to what God has in store on the horizon.

Thank you to our wonderful Board of Directors, our president Beebe Frederick, and all those who helped make the 40th Anniversary Luncheon a success!

This reunion was a wonderful time of

— This is a ministry of generosity —



Celebrating a Milestone



Celebrating a Milestone

— Celebrating 40 years of ministry with the AWF Conference —



Photos above by Luke Lucas, AWF Conference Communications Specialist

AWF Annual Conference

The 2019 AWF Annual Conference was held June 2-5. In celebration of the Foundation's 40th Anniversary, we hosted a photo booth for both lay and clergy members in addition to our annual informational booth. Giveaway items included teal and red pens, notepads, and business card holders for phones.

During the Monday business session, Terri Turner, Foundation Executive Director, was invited to say a few words following a video focused on the Foundation's ministry over the last 40 years (www.alwfmf.org/foundation-timeline).

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 for helping us celebrate these 40 Years of Ministry together!



Celebrating a Milestone



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

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

In this Issue:

Celebrating a Milestone

2018 Annual Report

**Serving Methodist & Historically
Methodist Ministries**

**Game Changing Generosity
Conference-Wide Events**

Read on the Go!

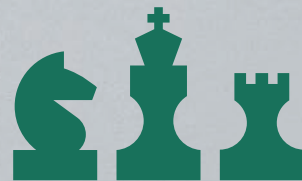
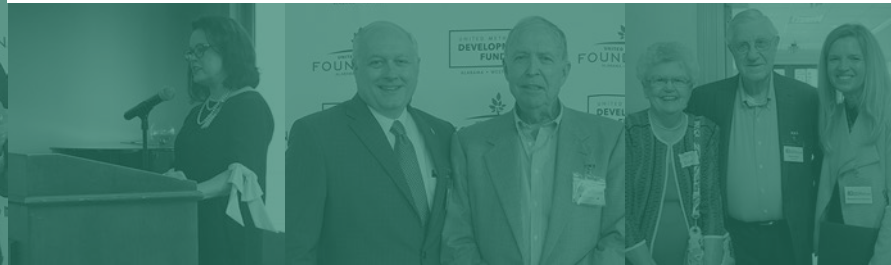
*Sign up for our digital
newsletter by emailing
foundation@alwfumf.org.*



PRSTD STD
U.S. POSTAGE
PAID
PERMIT 77
DOTHAN, AL
36302

Alabama-West Florida United Methodist Foundation

P.O. Box 8066 | Dothan, Alabama 36304
Phone: 334-793-6820 | Fax: 334-794-6480
alwfumf.org | foundation@alwfumf.org



Game Changing Generosity

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

**Conference-wide
Seminars Coming
September 5-6!**

These events are for Pastors, Executive Pastors, Associate Pastors, and Financial Administrators.

Provided by:



**Learn more by emailing foundation@alwfumf.org or
visiting www.alwfumf.org/Game-Changing-Generosity**



Scan QR with phone camera
to view event website