

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 | WINTER 2020

Our Ministries to Churches

Church Planned Giving Programs

Planned Giving Programs help encourage and facilitate planned gifts and endowments to the church. We teach church leaders how to establish and cultivate permanent sources of income to support and sustain church ministry programs while also offering 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, all other fiduciary administration services, and report this information to you on easy to read statements.



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. To learn more, visit www.alwfumf.org/churches/church-investing or email us at foundation@alwfumf.org.

Loans

The AWF Development Fund provides loan opportunities to churches with attractive rates, helps churches think through the application process and committee questions, and keeps churches connected to the United Methodist Church and the AWF Conference.

The Development Fund makes **low-interest loans for up to \$1 million*** to churches and agencies in the AWF Conference for new church construction, purchasing property, and large renovation projects. Loans through the AWF Development Fund have competitive interest rates, loan terms up to 15 years, do not charge points or closing costs, and interest earned from loans goes back to AWF Conference members and investors.

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*For loans larger than \$1 Million, contact us! The Foundation has the ability to negotiate with other Foundations for larger loans.

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*Development Fund Board of Directors

Our Ministries to Churches *(cont. from page 1)*



Game Changing Leadership, September 6, 2019, Montgomery FUMC

Educational Events and Webinars

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

Upcoming Event January 23: Game Changing Leadership in Mobile, AL is a one-day seminar for pastors, financial administrators, church staff, and lay leadership focused on resourcing you with new tips and tools that can easily be put into place to foster a generous culture in your church, develop financial leadership skills, and improve your personal financial health. See page 4 for more details.

Development Fund Investing

The Development Fund accepts investments from individuals, churches, and organizations across the AWF Conference. The Fund pays these investors a rate of interest set each quarter and makes loans to churches, agencies, and missions in the conference.

Interest is paid quarterly and is earned from the day of the deposit to the day of the withdrawal. You may withdraw all or part of your investment with a written/signed request at any time. There is no penalty, fee, or loss of interest when withdrawing funds. You can also choose to have your interest reinvested each year.

*Investments are not FDIC insured. Investments are secured by the assets of the Fund and the first mortgages of the churches. No investor in the fund has ever lost any part of their investment or interest earned.



Our Ministries to Individuals

Scholarships

Scholarships are available from numerous sources for both Ministerial and Lay students. The Foundation's Scholarship Committee (unless otherwise designated by the donor) determines which applicants meet the criteria for available scholarships based on information provided on the application. To learn more, visit: www.alwfmf.org/individuals/scholarships or email us at foundation@alwfmf.org.

Legacy Gifts Consulting

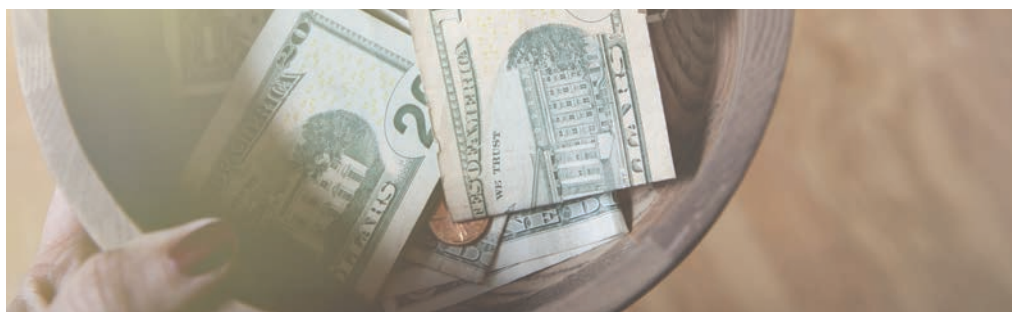
We offer **one on one meetings with individuals who are looking to do something generous for their church.** We provide a variety of legacy and planned giving options and can help you plan and set up these gifts to accomplish your specific goals for leaving a legacy in the church.

Development Fund Investing *(See above for details.)*

Generous Resolutions for the New Year

"You must each decide in your heart how much to give. And don't give reluctantly or in response to pressure. 'For God loves a person who gives cheerfully.' And God will generously provide all you need. Then you will always have everything you need and plenty left over to share with others."
2 Corinthians 9:7-8

A mindset of generosity is formed by one generous decision after another.



This year, consider finding a new charity to support, upping your annual gifts, or thinking of a new way you can support your church. Leaving a legacy of generosity begins with a daily choice to be generous with your time, talents, gifts, service, and witness.

quired minimum distribution (RMD)

- Create an endowment fund that will continually support your church or a ministry
- Invest in the Foundation's Development Fund to earn interest and help churches and other United Methodist ministries receive loans



Generous New Year's Resolutions for 2020:

- Create a bequest in your will to benefit your church or a charity
- Give a portion of your IRA to your church or favorite ministry to reach your yearly re-

If you are interested in setting up one of these generous gifts, or would like resources on more ways to give, call us at 334-793-6820 or email us at foundation@alwfumf.org.

Ways to Give in the New Year

IRA Gift

- Give a portion of your IRA and reach your yearly RMD (Required Minimum Distribution)
- Avoid federal income taxes and make a larger gift

Endowment Fund

- Give now or after your lifetime
- Support a ministry, building expansion, or create a scholarship fund
- Decide how ministry funds will be used

Donor Advised Fund

- Flexible gift that allows you to provide input on how the donation is managed and distributed
- Current income tax deduction

Stocks and Bonds

- Further the mission of your favorite UM church or ministry
- Receive a charitable income tax deduction for the current market value of appreciated securities*

Charitable Gift Annuity

- Contract to give after your lifetime and receive annual fixed payments now
- Current and future tax exemptions

*Total charitable contributions must exceed the standard deduction

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DAILY TIPS, INSPIRATION, AND RESOURCES



Scan QR code with smartphone camera



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Read on the Go!

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



UNITED METHODIST

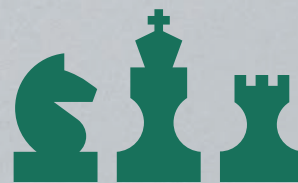
FOUNDATION

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Game Changing Leadership

JANUARY 23 • MOBILE, AL

Strategies you can put into place *RIGHT NOW!*

- Earn .4 CEU credit
- Foster a generous culture in your church
 - Develop financial leadership skills
 - Improve personal financial health

*An event for Pastors, Financial Administrators,
Church Staff, and Lay Leadership*

Provided by:



**RESERVE YOUR
SPOT TODAY!**



Scan QR code with
phone camera to view
event website and
reserve your spot!

For more information, email andrea@alwfumf.org or visit www.alwfumf.org/game-changing-leadership