

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 and Events
- Consulting
- Fund Administration
- Investment Services
- Church Planned Giving Programs
- Digital and Printable Resources
- Marketing Resources
- Quarterly Newsletters
- Monthly Eblasts

AWF Development Fund Services:

- Loans (3.95% rate)
- Deposit Accounts for Individuals and Churches (1.1% 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 2020

Blue Lake, A Ministry to Many



"Blue Lake is just one of those spaces, where for just a little while the world stops, and you get to just be with the God of the universe. In those cabins, chapels, gyms, craft rooms, meeting spaces, and cafeterias you find space to hear yourself think; to laugh and cry with friends; to pray deep rich prayers that change you; to worship free from restraint; and to engage in the mystery of the Lord's holiness. Along the lake, you can wander free of this world's entanglements and dream new dreams, God-size dreams." – Rev. Jean Tippit

Since 1951, Blue Lake has hosted summer camps, retreats, and many other group gatherings. There have been countless memories made, integral steps in faith journeys taken, and important milestones that have happened at this serene setting within the Conecuh National Forest in Andalusia, Alabama.

The UM Foundation has been blessed to partner with and support Blue Lake over the years. Since 1996,

the Foundation has held our annual Fall Board of Directors meeting on these beautiful grounds and enjoyed the facilities, food, and surroundings. **The Foundation also helped establish an endowment for Blue Lake, and the AWF UM Development Fund was able to refinance a large loan for Blue Lake enabling expansions and renovations.**

As summer comes to a close, our thoughts and hearts are with Blue Lake. For the first time since its doors opened, Blue Lake made the difficult decision to cancel Summer Camp for 2020. **This decision has left a deficit of more than \$300,000 that keeps utilities connected, facilities insured, staff employed, and the camp open to be used in the future.**

To help make up the deficit, Blue Lake is accepting monetary gifts, selling boxes filled with camp goodies, and offering a chance to host a Blue Lake Walk by Faith Virtual 5K. **To support Blue Lake, and for more information, visit the Blue Lake website: www.bluelakecamp.com.**



1996 UM Foundation Fall Board of Directors Meeting at Blue Lake

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OUR BOARD OF DIRECTORS

Beebe Frederick**

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**AWF Development Fund & UM Foundation
Board of Directors

*AWF Development Fund Board of Directors

2019 Annual Report

From the Executive Director



Terri Turner, Executive Director

Thank you on behalf of the Board of Directors of the U. M. Foundation for your support during the COVID-19 crisis, recent AWF Conference restructuring, and potential changes in the United Methodist Church and our conference. **The growth of your funds to over \$100 million in the Foundation and AWF UM Development Fund is evidence of your good stewardship** and planning. Our work has been made possible by years of service to your churches and members as well as the good stewardship of our operational resources. The Foundation budget is supported by fees based on the value of the assets under management and our endowed investments. Although subject to market volatility, this structure has allowed us to operate as a self-supporting agency for over 35 years.

The Foundation has positioned our 501c3 organization, much like Wespeth, to continue our work for ALL United Methodist and historically Methodist



churches, organizations, and agencies with no significant changes in our services. You can continue to count on the Foundation for:

- **Our mission** remaining the same. Our mission is, and always has been, 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 is to see lives changed, churches grow, and ministries expand.
- **Continuing services** that provide planned giving support, investment management of church funds, develop local church endowment programs, provide short and long-term

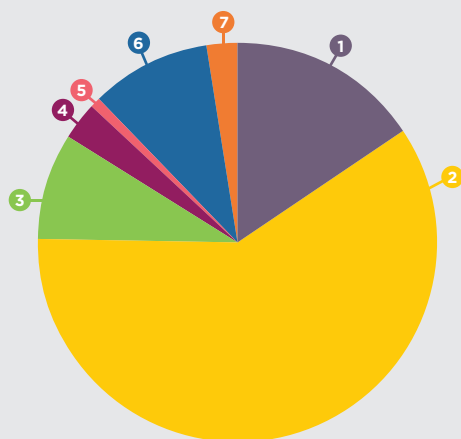


options for reserve funds, loans for building projects, and educational programs on a number of subjects. All while keeping in mind the possible need for counsel, flexibility, and contingencies during these times.

- **Investment Security.** Your investments will remain secure and managed as directed. Our Investment Policy and strategy is continually reviewed and offers options that are well diversified, professionally managed, and socially screened to reflect United Methodist principles.

2019 Annual Report

Assets Held by the Foundation



1. Local Church & Agency Permanent Funds

\$15,678,216.73

2. Local Church & Agency Managed Funds

\$67,173,371.44

3. Scholarship Funds

\$8,503,040.34

4. Charitable Remainder Trusts

\$1,227,047.32

5. Charitable Gift Annuities

\$271,035.04

6. AWF Development Fund

\$9,610,268.70

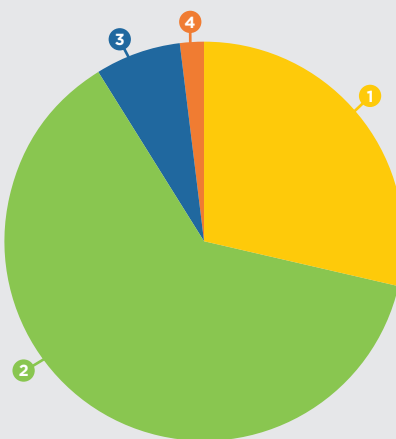
7. Foundation Assets

\$1,591,235.94

Total 2019 Assets
\$94,042,980

Current Assets
\$102,973,066.13

Contributions and Earnings



1. Contributions to New and Existing Accounts

\$4,689,221.75

2. Investment Income for Local Churches, Agencies, Scholarships, CRTs, and Annuities

\$3,612,154.99

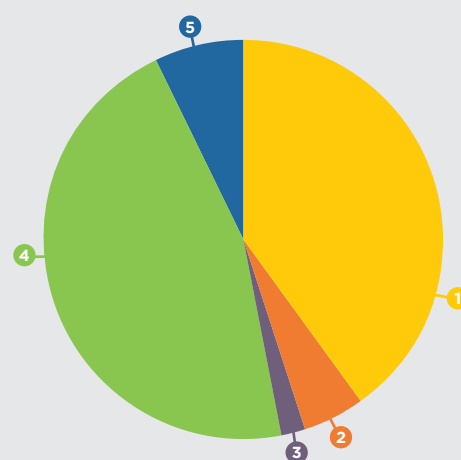
3. AWF Development Fund Income

\$292,828.62

4. Foundation Investment Income

\$36,172.87

Funds Distributed



1. Local Church, Conference, and Agency Funds

\$2,716,785.10

2. Scholarships

\$323,039.08

3. Life Income Payments to Donors

\$123,027.42

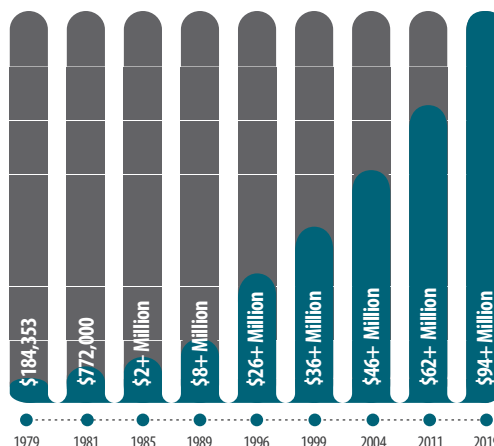
4. AWF Development Fund Distributions

\$1,222,168.60

5. Foundation Operating Budget

\$443,734.66

We are humbled by your loyalty and support of our work and look forward to many years of part-



nering together for the Kingdom. **Please continue to pray for our Conference, the United Methodist Church, the U. M. Foundation, and all whose ministries have been affected by these unusual circumstances.**

If you have any questions about your current relationship with the U. M. Foundation or how we may be able to help you, please contact us at 334-793-6820 or email foundation@alwfumf.org.

In this Issue:

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Read on the Go!
Sign up for our digital
newsletter by emailing
foundation@alwfumf.org
or scan the QR code with a
smartphone camera.



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alwfumf.org | foundation@alwfumf.org



Blue Lake, A Ministry to Many (continued from page 1)



"I accepted Christ in that chapel, received the call to ordained ministry in that chapel, served as a youth director in that chapel, journeyed through the ordination process in that chapel,

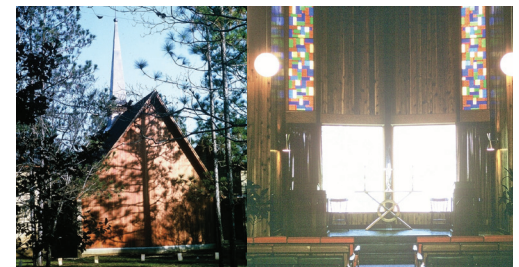
served on the Board of Ordained Ministry for 8 years through that chapel, and was back for family camp with Fairhope UMC last year. So yes, if you do a composition analysis of those altar rails, you will likely find my sweat and tears, from 1991 to 2019."

– Rev. Darren McClellan

"I have many memories of Blue Lake; camping with my family, going to summer camp, leading summer camps, and participating in the Holy Spirit confer-

ences, but my favorite memory is the two crosses. Walking down to the lake at night looking at the two lit crosses and seeing their reflection on the water stirs up so many good memories for me."

– Rev. Matt Albritton



Scan QR code with
phone camera to view
event website



Game Changing Leadership



BE RENEWED

August 18 & 20 • FREE Event with CEU Credit

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