



THE METHODIST
FOUNDATION
ALABAMA • WEST FLORIDA

The Methodist Foundation for Alabama-West Florida

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 Methodist and historically Methodist individuals and churches by encouraging generosity through education, consulting, development, and financial services.

Services

AWF 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 (0.40% 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 METHODIST FOUNDATION
FOR ALABAMA-WEST FLORIDA | SPRING 2022

Foundation Board Reaffirms Methodist Foundation Work



May 18, 2022, Spring Foundation Board of Directors meeting at Dothan FUMC

As we enter into the Annual Conference season and these times of change, Terri Turner and our Foundation Board of Directors would like to share some recent discussions we have had regarding the Foundation as we move forward.

We also want to reassure you that we will continue to serve you, regardless of denomination outcomes, with the care and support we have been providing since 1979.

On May 18th, the Foundation Board of Directors, which is made up of lay and clergy members, met for our semi-annual meeting. We **unanimously reaffirmed that the Foundation, as a faith-based organization, is committed to serving all facets of Methodism in the Alabama-West Florida area. We acknowledge that we are a unique ministry of planned giving, investment management, donor development, and more.** All of our services have taken years to perfect

to meet the specific needs of our churches, and as **the needs of our churches have and will continue to evolve, your Foundation will continue to look for ways to aid your church in growing funds for continued ministry.**



Foundation Board of Directors Investment Committee meeting at Blue Lake

Terri remarks, "In the early days of my 31 years with the Foundation, we only offered CDs and bonds as investment options. Over time, we grew to the size where we could meet investment manager minimums in order to offer diverse portfolios with low fees to our churches.

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OUR BOARD OF DIRECTORS AS OF APRIL 30, 2022

Terri Turner**

Executive Director of Foundation
foundation@alwfumf.org • 334-793-6820

Russell S. Dunman**

President of Foundation Board

Henry Hooks**

President of Development Fund Board

Steve Burch

Vice President of Foundation Board

David Graves

AWF Conference Bishop

Debora Bishop

Baypines & Mobile District Superintendent

Mike Pearson

Demopolis and Montgomery-Prattville
District Superintendent

Jean Tippit

Marianna-Panama City and Pensacola District
Superintendent

Jeff Wilson**

Dothan and Montgomery-Opelika District
Superintendent

Dennis Adams

Bill Hill

Howard Adams*

Hope Johnson*

Ben Barron*

Olen Kirby

Chris Beam

Suzanne Krejcar*

Tommy Boyd

Lauren Lynn

John Bullard Jr.

Beverly Maddox**

Eric Canada

Tony Mallini

Clay Carnathan*

Joseph McCorquodale

Shannon Carr Chancey

Howard Meadows

Ross Cotter

Jeff Outlaw

Mark Davidson

Bryan Poole

Ashley Davis*

Ed Reifenberg

Jana Ealum

Lany Simmons

Gene Floore

Mike Tucker

Beebe Frederick

*AWF Development Fund Board of Directors

**AWF Foundation and Development Fund
Board of Directors

If you are interested in partnering with the Foundation by joining our Board of Directors, please contact Executive Director Terri Turner at foundation@alwfumf.org.

Foundation Board Reaffirms Methodist Foundation Work *(cont. from page 1)*



Lauren Lynn (left), Jeff Outlaw, Gene Floore, Mark Davidson, and Jeff Wilson at the Spring 2022 Board of Directors Meeting

Additionally, we went through the process of applying for and getting registered to offer Charitable Gift Annuities and adding other gift opportunities such as Donor Advised Funds and a stock gifts service.” (for more details on ways to give through the Foundation, see page 5).



May 18, 2022, Spring Foundation Board of Directors meeting at Dothan FUMC

The work of the Foundation has been made possible by **43 years of service to AWF Conference churches and members**, alongside the good stewardship of operational resources. Our budget is supported by fees based on the value of assets under

management and endowed investments. Although subject to market volatility, this structure has allowed us to operate as a self-supporting agency with **over \$133 million in assets currently under management.**

The Foundation is positioned as a 501c3 organization to continue our work for ALL United Methodist and historically Methodist churches, organizations, and agencies with no significant changes in our services regardless of what the future may bring.

- **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.
- **Our continued services** include providing planned giving support, investment management of church and agency

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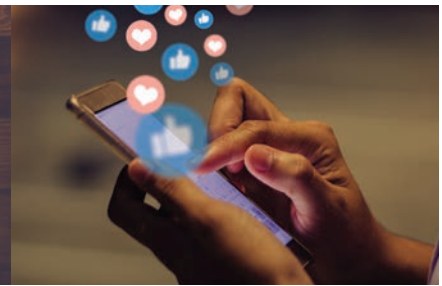
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f i t @ALWFUMF

TIPS, INSPIRATION, AND RESOURCES



Scan QR code with smartphone camera



Foundation Board Reaffirms Methodist Foundation Work

(continued from page 2)



Steve Burch (left), Tony Mallini, Chris Beam, Mike Tucker, and Lany Simmons at the Spring 2022 Board of Directors Meeting



Executive Committee meeting at the Spring 2022 Foundation Board of Directors meeting

funds, development of local church endowment programs, short and long-term options for reserve funds, loans for building projects, and educational programs on a number of subjects.

- **Your investment security** will remain at the same high standards we currently maintain, and funds will continue to be

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.

Thank you for allowing us to help you grow the funds need-

ed to grow your ministry! It is exciting to see the planning and commitment to future financial health, both personally and in our churches.

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

The Methodist Foundation for Alabama - West Florida 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.

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.

GENEROSITY DEVELOPMENT, WORKSHOPS, AND EVENTS

We offer generosity development through educational programs that foster a better understanding of giving and stewardship as both an act of worship and discipleship (www.alwfumf.org/events).

FUND ADMINISTRATION SERVICES

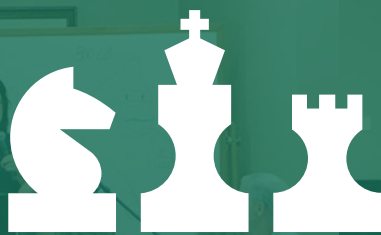
We provide trust fund accounting, regular disbursements, and all other fiduciary administration services. This information is reported to you on easy to read statements.



Join our email list for more resources to help your Methodist or historically Methodist church! Email foundation@alwfumf.org or scan the QR code on the left.



Upcoming Game Changing Leadership Events



Game Changing Leadership

A FOUNDATION EVENT

Visit www.alwfumf.org/events or email andrea@alwfumf.org to learn more and register for upcoming events.

"I wanted to share an appreciation for the excellent webinar. It was the most practical content I have ever heard on helping churches become generous. I think every pastor needs to hear this. Great service to the churches of the AWF Conference. Thank you to the Foundation for this gift."
— Rev. Rudy Heintzelman

In January 2019, the Methodist Foundation for Alabama-West Florida established Game Changing Leadership as a continuing service and resource to Alabama-West Florida Conference pastors, financial leaders, church staff, and lay leadership. **These events focus on a variety of financial topics and needs within the church including, but not limited to, fostering a generous culture, developing financial leadership skills, developing and implementing planned giving/legacy giving, and improving personal and church financial health.** Each event covers relevant topics and includes practical tips and tools that church leaders can easi-

ly put into place right away to start seeing an impact.

We are incredibly thankful to the hundreds of churches who have attended our Foundation events since 2019 and are blessed to be able to continue these events into 2022 and beyond. If there are topics you are interested in us covering, please email us at foundation@alwfumf.org.

"I have participated in at least 5 events and each one has given me new insights and tools to use in ministry that are especially helpful during our present circumstances due to the Covid-19 pandemic."
— Larry Teasley

Upcoming Events

We are excited about several upcoming Game Changing Leadership events throughout the rest of 2022 and into 2023:

- **May 19, 2022:** Creating a Culture of Generosity Post-Pandemic (email andrea@alwfumf.org to request a replay)
- **June 7, 2022:** Creating a Narrative Budget: The Story Behind the Numbers (email andrea@alwfumf.org to request a replay)
- **August 4, 2022:** Tools to Be More Effective as a Pastor with Your Church Budget and Finance Committee
- **November 3, 2022:** Capital Campaigns and Endowment Funds: What?, When?, How Much?, and How?
- **January 2023:** Analyzing Giving Trends
- **February 16, 2023:** Understanding Clergy Taxes
- **March 2023:** How to Handle and What to Do with Debt



Apply for a Scholarship

Apply for ministerial and lay scholarships by the **June 30, 2022, deadline!** Learn more: www.alwfumf.org/individuals/scholarships



Gift Options to Support the Local Church are Available Through the Foundation



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

Part of this mission includes **helping United Methodist and historically Methodist individuals, congregations, and organizations accomplish their charitable giving goals. Our Foundation can accept and manage gifts, transfer gifts, and advise individuals and churches on the best types of gifts for them.** Giving options are available to create a gift that makes a difference now, pays income, or leaves a legacy by sustaining life-changing ministry for generations to come.

Make a Difference Now

These types of gifts allow you to see the immediate impact your generosity has on your local church or ministry:

- **Cash:** A quick and simple way to make a gift. You can donate cash, securities, or personal property when making an outright gift.
- **Stocks and Bonds:** Give your local church or charity a larger gift by directly transferring stocks and bonds. The Foundation can assist with the transfer of these gifts.
- **Donor Advised Fund:** Donate assets to a donor advised fund or set up a family foundation. This gift allows you to manage all your charitable giving in one place, make annual distribution recommendations, and gives you the option to change which charities you support.
- **Real Estate/Personal Property:** Donate real estate, securities, or other appreciated assets or sell them at a bargain price.
- **IRA Rollover:** Reach the yearly RMD (Required Minimum Distribution) with a rollover gift from your IRA to your local church or a charity through a QCD (Qualified Charitable Distribution).

“The Foundation is one of the AWF Conference’s best kept secrets.”

Leave a Legacy

By designating your church as a beneficiary, these types of legacy gifts allow you to continue to support your local church or ministry after your death:

- **Bequest in a Will:** Name your church or a charity as the beneficiary of assets in your will, trust, etc. You maintain control of assets during your life and make the gift after death.
- **Endowment:** Create an endowment/planned giving program as a permanent source of income for your local church or a charity. These funds can support ministry, building expansion/maintenance, create a scholarship fund, etc.
- **Life Insurance:** Name your church or a charity as the owner and beneficiary of a life insurance policy you no longer need. This can be a large gift with little cost to you.
- **Retirement Plan Assets:** Name your church or a charity as the beneficiary of your remaining retirement plan assets after your lifetime.
- **Retained Life Estate:** Give ownership of your residence to your church or a charity but reserve the right to live there for your lifetime.
- **Revocable Living Trust:** Establish a revocable living trust to give assets such as real estate, stocks and bonds, collectibles, vehicles, etc., to your local church or a charity.

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Read on the Go!

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



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Gift Options to Support the Local Church are Available Through the Foundation *(continued from page 5)*



*This article is for general information purposes and is not a source of legal or tax advice. Individuals should consult professional advisors regarding all appropriate matters. Specific tax benefits depend on your personal tax situation and how you report your gift.

Gifts that Pay Income

Lifetime gifts benefit both you and your local church or a charity. These types of gifts are established now so you can receive a tax deduction and income payments. The local church or a charity you choose receives the remainder gift at your death:

- **Charitable Gift Annuity:** Create a permanent transfer of assets through the Foundation to your church or a charity in return for fixed annual payments for life for one or two people.
- **Charitable Remainder Unitrust:** Create a permanent transfer of assets to a trust that is invested. You or other beneficiaries receive a percentage of the trust assets (valued annually) for life or a term of years.

- **Charitable Remainder Annuity Trust:** Create a permanent transfer of assets to a trust, and you or other beneficiaries receive fixed annual payments.
- **Charitable Lead Trust:** Transfer your cash or property to fund a trust that makes gifts to a charity of your choice for a set number of years. Your family or another beneficiary receives the remainder.

Your gifts keep on giving and help provide financial security to the local church. Contact the Foundation office at 334-793-6820 or foundation@alwfumf.org for more information about any of these types of gifts or to let us help you identify the best gift options for you and your current situation!