

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 Wesleyan individuals and denominations 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 (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 | SUMMER/FALL 2022

The Foundation: A Ministry of Generosity



November 9, 2022 Fall Foundation Board of Directors Meeting at Blue Lake Camp

At the Foundation, our Board of Directors and staff work hard to fulfill our mission and ministry of serving churches and organizations in the Alabama-West Florida area. **On behalf of the Foundation's Board of Directors, we want to reassure you that, with our own 501c3, we will continue to serve Methodist and historically Wesleyan denominations** with the care and support we have been providing since 1979.*

Your local Foundation is 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 continue to evolve, the Foundation will continue to look for ways to aid your church in growing funds for continued ministry.**

In the early days of the Foundation, we only offered CDs and bonds as investment options. Over time, we grew in size and added diverse investment portfolios with low fees for our churches. Additionally, we completed the registration process to offer charitable gift annuities and added other gift opportunities such as donor advised funds and a stock gifts service.

It is a blessing to share in your successes and walk alongside you in your struggles while **providing financial vehicles and resources designed to help fund your continued ministry.** Thank you for allowing us to be part of your meetings and planning to discuss how we can do more with our collective resources to facilitate and encourage the generosity of God's gifts.



Fall 2022 Foundation Board Meeting

*The Methodist Foundation seeks to provide ministries and services to Methodist and historically Wesleyan denominations. Special circumstances may exist, and churches, funds, trusts, and loans will be looked at on a case-by-case basis. If you have questions about a current or existing account, please contact Terri Turner at foundation@alwfumf.org or 334-793-6820.

★★★★★
Share your story and experience with
the Foundation with a review!



Scan the QR code or visit
www.alwfumf.org/reviews



A Methodist Ministry that is Here to Serve



Fall 2022 Foundation Board Meeting • We are thankful for the invaluable leadership, insight, and skills of our Foundation Board of Directors to help lead us forward in this ministry of generosity.

Our Foundation's reputation as a Methodist ministry of generosity means the world to us, and our ultimate goal continues to be partnering with you to help you grow and sustain disciple-making ministries.

In order to share the Foundation's vision moving forward and how we can continue, or start, to provide services to your church, **we hope you will participate in a "One on One" call or meeting.** Pastors, financial leaders, and individuals with current accounts and those interested in the Foundation's ministry and services are encouraged to schedule a call or meeting.

On behalf of the Foundation staff and our Board of Directors, **it is an honor to continue serving you through the Foundation's unique financial ministry.** We send our heartfelt thanks to the hundreds of churches, donors,

and organizations who continue to partner with us in building His kingdom.

Frequently Asked Questions about Continuing Foundation Services:

Q: For a disaffiliated church, are the Foundation's services different?

A: The Foundation anticipates no change in investment/trustee services or administrative services to you. There may, however, be different requirements of the new denominations. For example, investment guidelines or the mortgaging of church property.

Q: Are scholarships still available to students who are not UMC/part of a church who disaffiliated?

A: Scholarships will be looked at on a case by case basis. When setting up a scholarship trust,

churches and individuals decide who the funds will benefit and how the funds will be used. If scholarships are from a scholarship "trust," the funds will continue to be used in the manner outlined in the trust document unless amended by the donor. Church boards establishing scholarship "managed funds" have the ability to amend the scholarship availability instructions and who their scholarships will benefit.



Fall 2022 Foundation Board Meeting

Q: Will you continue to make loans to traditionally Wesleyan (or Methodist) churches?

A: The AWF Development Fund was established with a capital campaign of the Annual Conference in the early 1980s with the mission and designated funds raised to offer low-cost loans for building and renovation projects for United Methodist churches. With the current articles of incorporation and by-laws of the Development Fund, we are currently only able to offer loans to United Methodist churches and organizations through the Development Fund. We are researching ways to offer loans within the framework of the new denominations and ways to build a pool of deposits available for that purpose. Churches with existing loans will transfer loan debt to the new church/entity.



One on One

A Conversation with Terri Turner

Learn how the Foundation will continue to serve you! Terri will answer any questions about current/future accounts and specific needs in your church context.

Scan the QR code or visit www.alwfumf.org/meetings to schedule a call.

OUR BOARD OF DIRECTORS AS OF JANUARY 1, 2023

Terri Turner**

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

Jeff Outlaw**

President of Foundation Board

Henry Hooks**

President of Development Fund Board

Mark Davidson

Vice President of Foundation Board

Steve Burch

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Gene Floore**

*AWF Development Fund Board of Directors

**The Methodist Foundation and AWF
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@alwfmf.org.*

"The Foundation is a ministry of generosity."

2021 Foundation Annual Report

The Foundation has grown the number of our relationships with churches and donors in the Alabama-West Florida area and, as a result, grown funds that support hundreds of ministries. **In 2021, our Foundation was entrusted with \$135,141,028 million, and each year disburses millions back into ministry, missions, buildings, education, and so much more.**



Assets Held by the Foundation

The Foundation meets the needs of churches, donors, and organizations by **investing and managing funds that support both current and future ministry.**

1	Local Church & Agency Permanent Funds.....	\$19,508,652.20
2	Local Church & Agency Managed Funds.....	\$91,719,237.65
3	Scholarship Funds.....	\$10,775,618.10
4	Charitable Remainder Trusts.....	\$1,264,696.50
5	Charitable Gift Annuities.....	\$85,543.71
6	AWF Development Fund.....	\$9,702,296.17
7	Foundation Assets.....	\$2,084,983.81
	Total Assets.....	\$135,141,028.14

Contributions and Earnings

Funds managed by the Foundation that are **growing and earning investment income to further the future ministry of the church.**

1	Contributions to New and Existing Accounts.....	\$5,370,081.08
2	Investment Income for Beneficiaries.....	\$11,156,172.30
3	AWF Development Fund Income.....	\$185,914.60
4	Foundation Investment Income.....	\$102,458.53

Funds Disbursed

Funds that have been **disbursed back into Alabama-West Florida ministries and churches for continued ministry and outreach.**

1	Local Church, Conference, and Agency Funds.....	\$2,375,025.16
2	Scholarships.....	\$301,330.53
3	Life Income Payments to Donors.....	\$113,262.28
4	AWF Development Fund Distributions.....	\$1,251,213.18
5	Foundation Operating Budget.....	\$469,057.30

In This Issue:

The Foundation:
A Ministry of Generosity

A Methodist Ministry
that is Here to Serve

2021 Foundation
Annual Report

Read on the Go!

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The Foundation is a unique ministry of planned giving, investment management, donor development, and so much more as we continue to serve Methodist and historically Wesleyan denominations with the care and support we have provided since 1979.



Game Changing Leadership

A FOUNDATION EVENT

Visit www.alwfumf.org/events
to learn more!

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Analyzing Giving Trends

with Chris Stovall and Terri Turner

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Understanding Clergy Taxes

with Don Joiner, Ken Sloane, and Terri Turner

MAR.
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How to Handle & What to Do with Debt

with Chris Stovall and Terri Turner

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.