

FAST FACTS

Mission:

To strengthen ministries of churches and agencies by encouraging generosity through education, consulting, development, and financial services.

Assets: Over \$114+ Million

Established: 1979

Core Ministries:

Planned Giving/Endowment Programs, Investment Management, Stewardship Development, Financial Education and Events, Loans, and Financing.

Church Planned Giving/Endowment Programs:

The Foundation works with churches to set up and facilitate planned giving and permanent endowment programs. An endowment is a gift that can be invested to support church ministry programs such as missions, scholarships, and building maintenance.

Trustee and Custodial Services:

The Foundation is empowered to act as a managing trustee of a charitable trust of which at least 50% of the assets will benefit a United Methodist church or institution.

Donor Consultation:

Foundation staff are available to meet privately with potential donors to help them clarify their charitable gift giving goals.

Investment Management:

The Foundation manages church and agency funds in accordance with the donor or donor church objectives. The funds are placed under professional management, and a small fee is assessed to cover administrative costs.

Long-term Investment Funds:

Funds may be invested according to objective or use into the Equity Fund, Income Fund, or Balanced Fund.

Oversight:

The Foundation's Investment Committee applies prudent investment guidelines and social screening of investments. The Committee also continually reviews and monitors investments to ensure stable and long-term growth. The Foundation provides an accounting of transactions with respect to each account invested in its common funds. The Foundation offers oversight and layers of accountability that give churches confidence in the responsibilities of fund management.

Generosity Development:

The Foundation offers generosity development through core ministries, educational programs, free personal and church financial workshops, and free events that foster a better understanding of giving and stewardship as both an act of worship and discipleship. Learn more: www.alwfumf.org/events

Development Fund:

The Development Fund makes loans to churches and agencies who qualify for refinancing large loans, new church construction, purchasing property, and major renovation projects. The Fund offers low-interest loans for up to \$1 million* and pays attractive interest rates to investors in Alabama and West Florida. Rates are set quarterly by our Board of Directors. For current rates, visit www.alwfumf.org/loans.

*The Foundation has the ability to negotiate with other sources for loans larger than \$1 million.



334-793-6820 | alwfumf.org | foundation@alwfumf.org