

Generosity is Faith in Action

For over forty years, we have encouraged generosity in churches and individuals. Our goal is to **inspire giving** within the church as individuals seek to grow in the image of God and service to Christ.

Free Consulting

We are committed to helping individuals and churches reap the fruits of God's call to generosity. Through **education and consulting**, we can discuss long-term financial planning, investment strategies, the gift-making process, charitable giving, estate planning, and planned giving/endowment programs.

Education

The Foundation offers **financial workshops and events for churches and individuals** to help create a culture of generosity, planning, and accountability. Workshops provided by the Foundation are free of charge (www.alwfumf.org/events).

Administrative Services

The Foundation staff provides **fund accountability and management services** by sending churches, agencies, and individual investors periodic financial statements and by following stated investment objectives.



GIVING, NOT GETTING, IS THE WAY

*Generosity
begets generosity*

LUKE 6:38 (MSG)

PLANNED GIVING • INVESTMENT SERVICES • GIFT ANNUITIES



SERVICES

We believe that if people are encouraged to live generous lives, they will strengthen not only themselves but the ministry and mission of the church.

Our purpose is to help individuals and the church by encouraging generosity through education, consulting, development, and investment services.

Planned Giving/Endowment Fund Program

Planned giving is the process of making a significant charitable gift during the donor's life or at death that is part of their financial or estate plan. The Foundation is here to help your church receive and manage these gifts to enhance your stewardship program. We also work with individuals on making charitable contributions, in the form of outright or planned gifts, to their church endowment fund.

Investment Services

Funds placed with the Foundation are professionally managed to meet the needs of the church. The Foundation's Investment Committee applies prudent investment guidelines and social screening of investments. The committee continually reviews and monitors investments to ensure stable and long term growth.

Investors can choose a strategy that meets their financial interest and stewardship goals by **investing in one or more of the Foundation's Common Funds** (see descriptions below).

- **Growth Fund:** The objective of this fund is long-term appreciation with minimal emphasis on income. This fund is invested in equities and equity alternatives listed on the national stock exchanges and in cash equivalents. The managers determine the asset mix.
- **Income Fund:** The objective of this fund is to produce maximum income with a high regard for safety. This fund is invested in U.S. Government and Agency bonds, AAA rated mortgage backed securities, and corporate bonds rated "A" or higher.
- **Balanced Fund:** The objective of this fund is reasonable long-term growth as well as current income. This fund is invested in a combination of approved equities and bonds with the current allocation at 70% equities and 30% bonds and money markets.

While past performance is no guarantee of future results, the Foundation provides attractive investment opportunities for furthering stewardship goals and ministries across the conference.

*What will
your legacy be?*



Gift Annuities

A charitable gift annuity is a lifetime gift established now, enabling you to receive payments for life and a current income tax deduction. The church would receive the remainder gift at your death.

A gift annuity is created with an irrevocable transfer of cash or property and can be created to provide payments for one or two people. Contact the Foundation for a free detailed illustration of your payout rate and tax deductions through a gift annuity.

Supporting Church Growth

The Development Fund accepts investments from individuals, churches, and organizations and pays attractive rates to these investors. For current rates, visit www.alwfumf.org/churches/investing.

The Fund uses these investments to offer low-interest loans to churches for up to \$1 million.*

*The Foundation has the ability to negotiate with other sources for larger loans.