

**The Alabama-West
Florida United
Methodist Foundation**

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 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 (5% rate)
- Deposit Accounts for Individuals and Churches (1.75% rate)

*Rates as of January 1, 2024



Generosity Matters

"Giving, not getting, is the way. Generosity begets generosity." Luke 6:38 (MSG)

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UNITED METHODIST FOUNDATION | SPRING/SUMMER 2024

Scholarships Bless Ministerial and Lay Students for Over 24 Years



Over \$4.5 million in scholarships has been awarded to students since 2000.

The Foundation is proud to manage and disburse scholarship funds that support and provide for the next generation of church and Christian leaders. Both ministerial and lay scholarships are available from funds set up by the Foundation, local churches, and organizations to benefit clergy, seminary students, and local undergrads.

“As an undergraduate attending Florida Southern College, I began to intentionally reflect on my potential call to ministry. With the aid of the United Methodist Foundation’s scholarship fund, I formally began a period of discernment as a Certified Candidate for Ordination in 2021. Now, I have completed my first year of seminary at Harvard Divinity School and am continuing to articulate my passion for sharing God’s love and the ways this passion may be lived out working in academia, the UMC general agencies, and other settings. **I am thankful for every person who has invested in this journey and made it possible for me to embrace my call without obstacles.**” - Grace Sill

“I am grateful for the support I got from the United Methodist Foundation. My studies at Asbury Theological Seminary have helped me with skills for evangelism and mission work. We have started an after school program and a feeding ministry at my local church in the past two years. **My calling, my vision as a pastor is clearer, I feel more confident and empowered.**”
- Shadreck Kagaro



Faith (left) and Samantha (right) Wheat

“Being a recipient of **this scholarship has allowed me to fulfill my dream to attend nursing school** while being a student athlete. The scholarship by the Foundation and my church truly made a difference in my continued education journey. I am forever grateful for their kindness to have received such an honor.”
- Faith Wheat

“The scholarship support from both the church and the Foundation has been influential in aiding my education and providing crucial financial assistance. **Receiving this scholarship has enabled me**”
Spring/Summer 2024 Newsletter | 1

OUR BOARD OF DIRECTORS

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

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**AWF Foundation and AWF Development Fund Board of Directors

to pursue my academic goals with greater ease and focus.

Their generosity has not only enlightened a financial burden but also inspired me to strive for excellence in my studies.”
- Samantha Wheat



Apply for a Scholarship

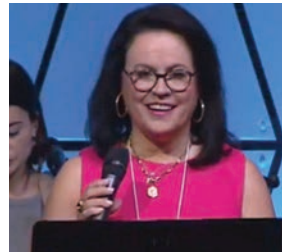
The deadline to submit scholarship applications each year is June 30th. To apply and learn more visit www.alwfumf.org/individuals/scholarships.

Foundation Managed Scholarship Funds

When you partner with the Foundation to manage scholarship funds, we offer services to receive, manage, and select applicants who meet your church or organization’s guidelines and requirements and disburse these scholarship funds to applicants.

Contact the Foundation office to learn more about how we can come alongside your church in managing different aspects of your current scholarship fund(s) or how to create a scholarship fund managed by the Foundation.

Sharing Our Ministry of Generosity at the AEC Conference



The AEC Annual Conference in Niceville, Florida, was a great opportunity to form new relationships and share the Foundation’s ministry of generosity.

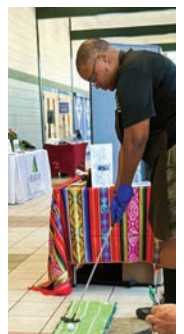
Throughout the conference, pastors and church leaders visited our booth to sign up for giveaways and learn more about ways to **partner with the Foundation through financial services, planned giving, investment management, donor development, and more.**

During the Tuesday session, Terri Turner, Foundation Executive Director, was invited to say a few words about the ministry, services, and work of the Foundation for all Methodist churches, individuals, and organizations.

What We Do:

- Church Planned Giving/ Endowment Programs
- Free Resources
- Investment Services
- Fund Administration Services
- Scholarships
- Educational Events and Workshops
- Legacy Gifts Consulting

To learn more about partnering with the Foundation, visit www.alwfumf.org or call Terri at 334-793-6820.



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.

Investing with the Foundation

The Foundation's investment services are uniquely created to provide **diversified, low-cost investment options for managing church and agency funds.**

Our 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 and offers **oversight and layers of accountability** that give churches confidence in



the responsible handling of managed funds.

Invest with the Foundation

• **Step 1:** A custom investment plan is developed for each participating organization or donor, and funds are managed in accordance with the outlined objectives.

• **Step 2:** Funds are placed under professional management, and a small fee is assessed to cover administrative costs. Funds may be invested according to objective or use into the Equity Fund, Income Fund, or Balanced Fund.

To learn more, call or email Terri Turner at 334-793-6820 or foundation@alwfmf.org.



Foundation Joins AWF Clergy in Renewal Event



On February 12th, the AWF Conference held a day of soul restoration and revival led by Bishop Lawson Bryan and Bishop Mike Watson at Dothan First UMC. Clergy enjoyed worship, messages, fellowship, lunch, and resources from both the Foundation and Wespath. Bishop Bryan and Bishop Watson blessed all attendees with their words of encouragement and hope.

Ministry can take a toll on the bodies, minds, and spirits of clergy, and this event was a chance to Restore. Renew. Rejoice.

The Foundation was blessed to be present at this event and share **how our financial services can both support and benefit churches and individuals.**



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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.



Alabama-West Florida United Methodist Foundation

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If your church name, address, or email has changed, please email andrea@alwfumf.org to update your information!

UNITED METHODIST DEVELOPMENT FUND

ALABAMA • WEST FLORIDA

We make loans to churches, agencies, and missions for purchasing property, refinancing large loans, building projects, major renovation projects, and new church construction.

Development Fund loans have helped build new sanctuaries and recreation centers. They have also aided in expanding ministries through property purchases, roof replacements, air-conditioning replacements, landscaping, interior and exterior remodeling, parking lot expansions, and much more.

Loans

- Low-interest loans for up to \$1 million*
- Loan terms for up to 15 years
- Fixed interest rates, currently set at 5%, for one year
- Competitive interest rates
- No points or closing costs
- Complying with denominational guidelines

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

Deposit Accounts

- Earn interest and support church growth
- Interest rates, currently 1.75%, are set quarterly
- Interest is paid, or reinvested, quarterly
- All or part of an investment can be withdrawn at any time with a written/signed request

*Investments are not FDIC insured. Investments are secured by the assets of the Development Fund and the first mortgages of the churches. No investor in the Development Fund has ever lost any part of their investment or interest earned.