



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



ALABAMA • WEST FLORIDA

Generosity Matters

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

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Tips for Giving in 2025



way to begin the process is by thinking of the things you are most passionate about, then finding a church ministry or charitable organization that is meeting those needs and goals.

Giving Tips

- Set a giving goal and decide how much you want to give ahead of time
- Look for a church ministry or organization that matches your goals, passion, and values
- Research how and what the donation will be used for within the organization
- Research different ways to give such as legacy giving, IRA QCD gifts, Donor Advised Funds, Stock gifts, and more (as well as any potential tax benefits) that benefit both you and the organization (for a list of giving options, visit: www.alwfumf.org/ways-to-give)
- Give throughout the year or save funds to make a larger overall year-end gift
- Request a donation receipt

Now is the perfect time to think about and plan for 2025 charitable giving. There are a variety of options to tithe from a work bonus, get an early start on giving for the year, set up recurring gifts through a Donor Advised Fund (see page 3), bless others, and benefit from attractive tax deductions. Charitable gifts provide the opportunity for you to make a difference in the lives of others, show generosity, and support needs within your church and community.

To speak with one of our professionals about what type of gift will benefit you and your church or charitable organization the most, call us at 334-793-6820 or email us at foundation@alwfumf.org. We are happy to assist you through the gift planning process.

It is easy to become overwhelmed with donation requests from great organizations, but when and where is the best place to start? One



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



"The Foundation is a ministry of generosity."

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foundation@alwfumf.org • 334-793-6820

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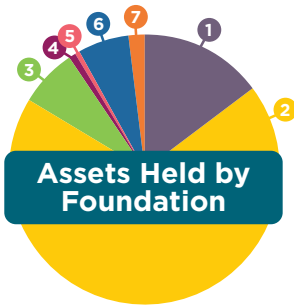
Executive Director of Foundation

foundation@alwfumf.org • 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.

2023 Foundation Annual Report

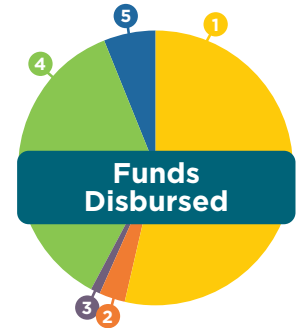
The Foundation has continued to grow the number of our relationships with churches and donors and, as a result, has grown funds that support hundreds of ministries. **In 2023, our Foundation was entrusted with \$121,035,941.35 million (\$132,127,428.53 million as of 9/30/2024) and disbursed millions back into ministry, missions, buildings, education, and so much more.**



Assets Held by Foundation



Contributions & Earnings



Funds Disbursed

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.....	\$18,044,211.14
2	Local Church & Agency Managed Funds.....	\$83,909,036.60
3	Scholarship Funds.....	\$8,351,332.91
4	Charitable Remainder Trusts.....	\$945,198.91
5	Charitable Gift Annuities.....	\$73,446.84
6	AWF Development Fund.....	\$7,553,845.64
7	Foundation Assets.....	\$2,158,869.35
	Total Assets.....	\$121,035,941.35

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.....	\$2,295,932.82
2	Investment Income for Beneficiaries.....	\$2,163,699.08
3	AWF Development Fund Income.....	\$296,887.74
4	Foundation Investment Income.....	\$32,991.68

Funds Disbursed

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

1	Local Church, Conference, and Agency Funds.....	\$4,678,661.28
2	Scholarships.....	\$261,935.74
3	Life Income Payments to Donors.....	\$100,280.00
4	AWF Development Fund Distributions.....	\$3,085,737.72
5	Foundation Operating Budget.....	\$521,350.07

Giving as a Family Through a Donor Advised Fund



Start a tradition of generosity this year with a donor advised fund (DAF). This is a great way to manage all your charitable giving in one place, practice generosity, and teach younger generations the importance of philanthropy by involving them in distribution recommendations every year. A donor advised fund has several appealing benefits as an avenue of generosity, including the flexibility to change which Methodist churches and organizations will benefit from the fund, minimal start-up time and costs, donations that are generally deductible at fair market value, and the ability to avoid capital gains taxes (gifts of real estate and appreciated securities).

To learn more about starting a Donor Advised Fund, call us at 334-793-6820 or email us at foundation@alwfumf.org.

How a Donor Advised Fund Works:

1. Create a donor advised fund with the Foundation with a minimum initial contribution of \$10,000
2. Receive an immediate tax deduction for the value of your gift
3. The Foundation invests the funds in a balanced, conservative portfolio that applies prudent investment guidelines and social screening of investments. Your fund assets grow tax-free.
4. Make your initial and annual recommendations of how the funds should be distributed to 501(c)(3) charities (50% of annual distributions must benefit a Methodist church or ministry)
5. At any time, you and others can make additional contributions to the fund in any amount
6. Receive annual statements of all contributions, distributions, and fund earnings
7. Appoint a successor to continue your legacy of generosity when you pass, or have the Foundation convert the donor advised fund into a permanent endowment supporting your chosen charities

A Donor Advised Fund Could Be Right for You If:

- You want to simplify your giving into one fund instead of making individual donations to various charities
- You have considered creating a private foundation and would like a lower-cost alternative
- You have appreciated assets such as real estate, stocks, bonds, etc.
- You want to teach principles of generosity to children or grandchildren by allowing them to assist in charitable distribution recommendations
- You are expecting the sale of a business or property that is not your principal residence
- You receive a non-taxable life insurance death benefit, an inheritance, or a legal settlement
- You want to give now and see how that gift is making a difference while you're still alive



Mission and Ministry Continues through Foundation Board



The Foundation is a unique financial ministry of planned giving, investment management, donor development, financial education, and more, serving historically Wesleyan churches, individuals, and organizations. Our work is enhanced by a wonderful Board of Directors, made up of

lay and clergy members, and their vast knowledge and experience in areas of investing, banking, insurance, marketing, church leadership, and more.

Over the years, we have continued to refine existing services, add new services, and look for ways to aid churches in growing funds for continued ministry.

Thank you for allowing us to partner with you. We look forward to continuing to serve you in 2025 and beyond!

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Mission and Ministry Continues
through Foundation Board

Read on the Go!

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



   @ALWFUMF



Alabama-West Florida United Methodist Foundation

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www.alwfumf.org | foundation@alwfumf.org

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



Game Changing Leadership

A FOUNDATION EVENT

Online events for pastors and
financial leaders within the church.

JAN

14

Engaging New Givers

with Chris Stovall and Broderick Santiago

FEB

13

Understanding Clergy Taxes

with Ken Sloane

MAR

6

The Offering Moment

with Chris Stovall and Broderick Santiago

"Thank you and the Foundation for offering such an informative webinar. I really enjoyed and learned from Chris' and Broderick's comments and information. It has challenged me to grow in my faith and give generously in all aspects of my life." Ann Pearson at Fairhope UMC

Game Changing Leadership 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 easily put into place right away to start seeing an impact. To learn more and register for upcoming webinars, visit: www.alwfumf.org/events.