Coming to the Western North Carolina Conference

Dr. Leonard Sweet

April 17, 2010

Keynote Address

“What Freely You Have Received, Freely Give: A Holistic Theology of Receiving and Giving”

Dr. Leonard Sweet

Dr. Leonard Sweet is author of more than two hundred articles, 1200 published sermons and almost forty books. Dr. Sweet is currently working on two textbooks: one on preaching (Giving Blood) and one on evangelism (Pay Attention: Every Bush is Burning). His most recent book is *So Beautiful: Divine Design for Life and the Church*. The last two years, Dr. Sweet has been voted by his peers as “One of the 50 Most Influential Christians in America” as polled by Church Report magazine. His popular weekly podcast is called “Napkin Scribbles.”

Dr. Sweet served from 1995 to 2001 as Vice President of Academic Affairs and Dean of the Theological School at Drew University, Madison, New Jersey where he currently occupies the E. Stanley Jones Chair of Evangelism. He is also a Visiting Distinguished Professor at George Fox University in Portland, Oregon, and President Emeritus of United Theological Seminary. He is a weekly contributor to the online preaching resource, *sermons.com*.

What: 2010 Spring Stewardship Event - *Life, Faith and Money*

Sponsored by: Stewardship Committee of the United Methodist Foundation of WNC, Inc.

When: April 17, 2010 9:30 – 2:00

Who: Dr. Leonard Sweet and leaders from WNC Conference

Where: Mt. Tabor United Methodist Church

3543 Robinhood Road

Winston Salem, North Carolina

Cost: $20.00 Per Person (Payable at the door-lunch included)

Event Schedule:

- Keynote address 10:00 – 11:00
- 1st Break-out Session 11:15 – 12:15
- Lunch 12:15 – 1:00
- 2nd Break-out Session 1:00 – 2:00

Four Break-Out Sessions: You may choose two

Registration Deadline: April 9, 2010

Register Online at: [www.umfoundationwncc.org](http://www.umfoundationwncc.org)

Break-Out Sessions:

- **The Simple Life** – Dr. Leonard Sweet
- **Family/Children Stewardship** – Rev. Gloria Hughes/Caroline Wood
- **Environmental Stewardship** – Reverend Dr. Boyd Holliday
- **Clergy Communication Related to Stewardship** – Reverend Dr. Kenneth Carter

Registration Deadline

April 9, 2010
On Nov. 10, 2009, your United Methodist Foundation staff, board and committee members, along with special friends, celebrated a ground-breaking ceremony for a new 7,400 square foot office building. This day fulfilled a dream that began 25 years ago, in 1985, when the Foundation became an active entity within the Western NC Conference.

In late 2007, the Trust Department of Wachovia Bank advised the Foundation that we were a designated beneficiary of the estate of Mrs. Margaret Bishop Booth. Mr. and Mrs. S. Hart Booth were devoted, faithful United Methodists. Because of their love for Christ and His church, they chose to leave a portion of their estate to your Foundation. Due to their generous gift and because of the current economic climate of reduced land and building costs, your Foundation will be able to move into our new building by fall 2010 debt-free, a tremendous blessing and a statement of stewardship in and of itself. The entire project, including land, building and furnishings is estimated to cost $1.2-1.4 million. This new energy-efficient building is designed for more effective use of space, while providing for growth of both staff and ministry.

**Mr. and Mrs. S. Hart Booth**

Building progress on the new site is moving along quite rapidly. Already, the land has been cleared, pilings driven, footings laid and the foundation ready to pour. Our new building will be located in The Park at Huntersville, a planned office development near I-77 Exit 23. A 1,250 square foot multi-purpose room will be used for board meetings and gatherings of conference committees and groups. Your Foundation is looking forward to the opportunity to welcome our constituents in the Western North Carolina Conference in need of meeting space at a more central and convenient location.

**Ground Breaking Ceremony**

Mr. and Mrs. S. Hart Booth

The United Methodist Foundation of Western North Carolina, Inc. does not engage in rendering legal or tax advisory services. Charitable and planned gifts involve complex federal and state laws. Professional advice from legal counsel or other personal tax or financial advisors should be sought. Be sure to consult your own professional advisors as it pertains to your own individual situation.
Planned Giving Focus

No Better Time than Now

With spring approaching, there’s no better time for fresh starts, so why not take a moment to begin something new? Just as plants produce new growth, there’s something simple we can do to bring newness to our lives by creating or updating our will. Many people are reluctant to write a will, or even discuss one. Contrary to what some believe, a well-written plan is not about life without us, rather, it affirms the life within us. When we write a will, we tell the world what’s important to us. It affirms our hopes, our dreams, our values and it protects our loved ones and cherished causes. Take a moment this spring to enjoy all the season has to offer. But also let it serve as a reminder to call your attorney about writing your will, or to ask if it needs updating. This spring, particularly during this Lenten season, think about your values, your beliefs, your family members and don’t forget your church. Preparing a will is about as simple as writing a letter. A well-written will is nothing more and nothing less than a statement of what is important to you. The most difficult part of preparing a will is simply taking the first step – deciding to do it.

Whether you are creating a will for the first time or revising it for the fifth time, you should use an attorney. Most attorneys charge relatively little for this service. They are accustomed to writing wills and many of them utilize a questionnaire that will help you through the process. Once completed, your will can benefit your family, friends, your church and those ministries that have been most important to you. Certain states have very specific requirements, such as the need for witnesses or other formalities to insure that your will is authentic and reflects your wishes. Without these requirements, your will may be invalid. Take a moment today to consult your attorney. If you do not have an attorney, ask friends and neighbors who they’ve used to write their wills. You will probably spend far less than you think and receive far more peace of mind that you thought possible.

In addition to creating a will there are many planned giving vehicles which allow you to take care of both loved ones as well as your church or the ministries that have had great meaning in your life. Your United Methodist Foundation can assist you in exploring the many ways you can accomplish your charitable goals through a legacy gift. Whether you are creating a will, updating your will or establishing a planned gift, it is a wonderful way to celebrate a fresh new start and to affirm the life within you.

Investment Returns as of December 31, 2009

<table>
<thead>
<tr>
<th>Fund Name</th>
<th>Asset Allocation</th>
<th>Quarter Return*</th>
<th>Trailing One Year Return*</th>
<th>Since Sept. 2004*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conservative Fund</td>
<td>30% Equity 70% Fixed Income</td>
<td>1.87%</td>
<td>10.29%</td>
<td>2.87%</td>
</tr>
<tr>
<td>Balanced Fund **</td>
<td>50% Equity 50% Fixed Income</td>
<td>2.43%</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Diversified Fund</td>
<td>70% Equity 30% Fixed Income</td>
<td>3.31%</td>
<td>22.38%</td>
<td>4.19%</td>
</tr>
<tr>
<td>All Equity Fund***</td>
<td>100% Equity</td>
<td>4.51%</td>
<td>26.02%</td>
<td>-0.31%</td>
</tr>
</tbody>
</table>

* Returns are net of Manager Fees

** Balanced Fund - Since Inception Date April 2009
*** All Equity Fund - Since Inception Date September 2006

Planned Giving Opportunities for Individuals

The planned giving vehicles offered by the United Methodist Foundation provide excellent opportunities for making gifts that leave a legacy for ministry for future generations.

Charitable Gift Annuities
A contract with the United Methodist Foundation whereby the donor receives an annual fixed rate of income for life in exchange for a charitable gift. The Foundation’s maximum annual pay out rate is 6% depending on the donor’s age. The donor’s chosen United Methodist charity receives the remainder of the gift or “residuum” at the termination of the contract.

Charitable Remainder Trusts
The donor’s attorney creates a trust naming the Foundation as trustee. The Foundation pays either an annual fixed rate to the donor (annuity trust) or a fixed percentage of the annual value of the trust (unitrust) for the life of the trust. Once the trust matures, the remaining assets are transferred to the donor’s United Methodist Church or church-related institution.

Charitable Lead Trusts
A trust vehicle managed by the Foundation. During the term of the trust, the income earned is given to the United Methodist entity of the donor’s choosing. At the end of the trust term, the remaining assets of the trust are either returned to the donor or given to his or her heirs.

Donor Advised Funds
The donor transfers cash or appreciated securities to the Foundation and receives an instant charitable deduction. The donor makes a recommendation to the Foundation of his/her desire for charitable giving and then the Foundation makes the gift to the charity on the donor’s behalf.

To learn more about these gift planning vehicles or to obtain a no obligation, confidential example of how a charitable gift could benefit you and the ministries you support, contact our office.
“Building Faithful, Financial Partnerships”

You may remember in early 2009, the United Methodist Foundation temporarily suspended our charitable gift annuity program in response to the economic downfall of 2008. The Investment Committee of your Foundation worked diligently in 2009 reviewing our charitable gift annuity program and determined that changes were needed to provide greater assurance for our United Methodist Churches, related institutions and ministries as future beneficiaries of charitable gift annuities.

A charitable gift annuity is a contract between the donor and the United Methodist Foundation whereby the donor receives an annual fixed rate of income for life in exchange for a charitable gift. The pay out rate is determined by the donor’s age. At the termination of the contract the donor’s chosen charity, ministry, United Methodist Church or related institution receives the remainder of the gift or “residuum”.

On November 10, 2009 the Investment Committee made a recommendation to the UMF Board of Directors to approve a new Charitable Gift Annuity Program which was instituted and made effective December 1, 2009. Some of the changes and features of the new Charitable Gift Annuity Program include:

- Minimum gift value of $10,000 but no longer a maximum gift value
- At the termination of the contract, residuum payouts will be based on a percentage of the original gift in relation to the pooled CGA assets
- Reinsurance may be considered on a case by case basis
- Donor’s annual fixed rate of income is based on ACGA rates up to a maximum payout of 6%
- At least 50% of the charitable beneficiaries must be designated as United Methodist entities or affiliates

We are confident that these changes will provide greater assurance for our donors as well as their chosen charitable beneficiary and that this new Charitable Gift Annuity Program will benefit all parties involved.

In the interest of being good stewards of the environment and prudent regarding our resources, the UMF quarterly newsletter “Money & Meaning” is available electronically. You may sign up on the home page of our Web site at www.umfoundationwncc.org.

As always, all of our newsletters are available for you to access directly on our Web site under “resources”.

UMF Development Fund Rate (as of December 31, 2009) 2.00%*

UMF Loan Program Interest Rate (as of December 31, 2009) 4.00%*  
*Interest rate subject to change on a quarterly basis.