



"Building the Church for Generations to Come"

Foundation News

Foundation announces Fourth Quarter 2014 Investment Performance

We are pleased to share with you the fourth quarter 2014 investment performance for funds that are invested with the United Methodist Foundation of Western North Carolina, Inc. We are also pleased to celebrate an all-time record high in total assets under management by the Foundation in excess of \$158 million.

The Diversified Fund, our flagship fund created specifically for endowment type monies, had a 2.96% return for the fourth quarter of 2014. This is in line with a 2.67% return for the benchmark. The Fund's trailing one year return reflected an impressive return with an 8.32% return compared to the relative benchmark of 6.65%. The trailing three year return was 14.00% versus the benchmark of 12.57%. The return since inception (September 2004) of 7.55%, versus a benchmark return of 5.95%, continues to support the Foundation's long term investment strategy.

Please note that our investment strategy is defined by a larger context, the context of Christian stewardship. The leadership of the United Methodist Foundation continues to believe that everything we do falls under the umbrella of stewardship and that we are here to help you be good stewards. This means that even those who help us manage our funds are stewards along with us.

How do we define stewardship? Most succinctly, we believe that stewardship is everything we do after we say "yes" to Christ. As a Christian foundation, we believe it is incumbent upon us to help people recognize their lives and resources are gifts from God and to help them find ways to use their gifts in ways that are God-centered and responsible.

Investment Performance Summaries may be viewed on our website at www.umfwnc.org or by clicking the following:

[Diversified Fund Performance Summary](#)

[Balanced Fund Performance Summary](#)

[Conservative Fund Performance Summary](#)

[All Equity Fund Performance Summary](#)

For more information, please contact Christian Burns at the Foundation office at 888.450.1956 or by email at cburns@umfwnc.org.

Building the Church for Generations to Come

If one were to view the mission statement of the United Methodist Foundation of Western North Carolina, you would find within the mission statement the following excerpt:

“Building the Church for Generations to Come”

This statement completely encompasses the purpose of the Development Fund and UMF Loan Program. The UMF Loan Program was created to provide competitively low interest rate loans to United Methodist Churches, institutions and other related United Methodist organizations in North and South Carolina. These loans are available for acquiring new property, the building of new churches or United Methodist institutions, expanding or renovating existing facilities, or for refinancing existing debt at lower rates all for the purpose of growing ministry across the Carolinas.

The Development Fund & UMF Loan Program helps your church be a good steward of its resources, freeing up more funds for vital ministries.

Investment Rate: 1.50% Loan Rate: 3.50%

**Rates effective through March 31, 2015, and are subject to a quarterly adjustment*

For more information, please contact Christian Burns at the Foundation office at 888.450.1956 or by email at cburns@umfwnc.org.

Creating a Legacy through Planned Giving

When was the last time your church hosted a workshop on creative ways to give to your church while also benefiting an individual and their family? How can an individual make a lasting gift to your church through their will or estate plan, or other planned gift? Many planned gifts have attractive tax and income advantages for the donor and the donor’s family as well.

“Many people can make a planned gift to their church but either don’t know they can or don’t know how to do it,” according to Christian Burns, Executive Director, Client Relations & Cultivation of the United Methodist Foundation of Western North Carolina. “They can have an impact on the mission and ministry of their local church beyond their own lifetime. Churches can utilize the Foundation to assist members and friends make a lasting gift to their church.”

According to Christian, “People can give the church many different kinds of gifts, not just through the offering plate on Sunday morning. Most people tithe or pay their pledge from income, but people can also give from their assets. For example, a gift of appreciated stock is welcomed by the church, and in most cases can be given without a tax consequence to the giver. We also encourage people to leave a lasting legacy to their church through bequests from their will or estate plan.” Other gift arrangements, such as Charitable Gift Annuities, combine a gift to the church with annuity payments for the donor or donors for their lifetimes.

For more information regarding planned giving workshops, please contact Christian Burns at the Foundation office at 888.450.1956 or by email at cburns@umfwnc.org.

Applications Now Being Accepted for the Reynolds Program in Church Leadership

The Royce and Jane Reynolds Program in Church Leadership is now accepting applications from Elders for the 2015/2016 Certificate Program in Church Leadership. This program is offered by the UMF with facilitators from the Center for Creative Leadership. The program brings together 24 pastors from 5 conferences who are committed to self-development as a means of transforming the local church. It is a year of professional feedback and peer support with a strong focus on accountability. Applications are due March 27, 2015. Selected participants will be notified by May 20, 2015. For detailed information, please contact Wanda Carpenter at the Foundation office. An application may be downloaded from the Foundation’s website at www.umfwnc.org or may be downloaded directly by [Clicking here](#).

Celebrating Generosity: 2014 UMFWNC Annual Report Now Available

This year’s annual report is titled *Celebrating Generosity*. As we reflect back on the ministry of the United Methodist Foundation of Western North Carolina, Inc., we hope that all of our ministries celebrate the generous nature of our Creator God. Reflected in the annual report is a celebration of the generosity at work in United Methodist hearts and houses of faith. To request a copy of the annual report, please contact the Foundation office at 888.450.1956 or visit the Foundation’s website at www.umfwnc.org or to download directly [click here](#).

United Methodist Foundation of WNC Endorses Personal Financial Stewardship Program

Money \$ense: Managing All Your Money for Personal Happiness, Family Security, and God..... Jesus Christ calls all Christians to be guardians of all God's gifts to us, especially the financial resources God has entrusted into our care.

Money \$ense enables Jesus' call to wise money management with a six-part sermon series and/or Bible Study created by members of the WNCC. The goal of Money \$ense is to preach/teach Christian adults, youth, and children and others basic strategies about faithful stewardship of all of our money. Money \$ense is not a comprehensive program that answers all financial questions. Instead, Money \$ense provides a broad introduction to basic financial strategies to enable Christians to put their own financial houses in order. There is no cost. Money \$ense is available on the UMF website at www.umfwnc.org

Looking for a Place to Hold a Meeting or Day Retreat?

The Foundation will be glad to host your group at our office located at 13816 Professional Center Drive, Huntersville, North Carolina. For more information contact the Foundation office at 888.450.1956.

Gift Legacy eNewsletter

We are delighted to make available to you our weekly eNewsletter. Many of our friends find this very interesting and helpful. It features news from Washington, Savvy Living, gift stories, finance news and timely articles. To subscribe, please [Click here](#).

We Are Honored to be a Partner in Ministry With You!

For more information regarding the ministry offerings of the United Methodist Foundation of Western North Carolina, Inc., please visit the Foundation's website at www.umfwnc.org or by contacting the Foundation office directly at 888.450.1956 (toll free) or 704.817.3990