

# Foundation

*A Report of the United Methodist Foundation to the Wisconsin Annual Conference*

## The Best Gifts are “Heart Guided”

A significant portion of our mission at the Wisconsin United Methodist Foundation is helping persons fulfill their desire to share. The church is a wonderful arena in which to do that sharing.

In June of this year, I was fortunate to be part of an International Volunteer In Mission group from First United Methodist Church – Madison which traveled to Cuba. This group of nine men and women spent 10 days working on the continuing construction of a Methodist Church in Guanabacoa (a suburb of Havana). It was also an opportunity to worship and share with Cuban Methodists in a number of urban and rural church settings.



*John Stolzenberg shares some music with Roxana and friends*

John Stolzenberg, a member of the VIM team and a flute player, found a flute at an antique shop in Deerfield. He decided to purchase the flute, inspected it to be sure it was in good condition, and brought it along on the trip to Cuba. In conversation with the Pastor of the Methodist Church in Guanabacoa we learned

that there was a young woman in the church, Roxana, who was an excellent flute player. Because of a scarcity of instruments in the schools Roxana shared the one school flute with other students. The decision was made to present this flute to Roxana.

The Pastor arranged to have Roxana and her mother visit the church during our noon meal break. John graciously placed the flute in her hands explaining that it was a gift from friends in the United Methodist Church in Madison, Wisconsin and now belonged to her. Overwhelmed, Roxana lifted the instrument to her lips and the most beautiful music flowed forth without effort. After a concert of two major musical pieces played from memory, all those who had gathered to listen applauded as tears of joy flowed from every eye. The best gifts are offered from one heart to another in just the right place and moment. Can we help you with that special gift?



*Rev. William Helwig  
WUMF President  
and Cuban Volunteer*



*Roxana gives an impromptu performance on her new flute*

Call us toll-free at 1-888-903-9863. We can help you make a special gift using shares of a mutual fund or appreciated stock, a life insurance policy, or land you feel called to give to make a difference.

*William J. Helwig*

## Charitable Giving

### “This too Shall Pass!

Rev. Joyce Alford will be remembered for her gift of administration, her ability to envision new possibilities for ministry, her strong faith, and her brilliant sense of humor! Her famous saying, “**This too shall pass!**” was shared with us in the midst of laughter and tears, as well as times of anxiety and moments of great anticipation. Joyce's “This too shall pass” could lighten a difficult or tense moment and always helped us put life back into a realistic perspective.

When Joyce told us, “This too shall pass!” we may have laughed. Yet she also taught us that everything we have is a gift from God and we are called to be stewards of these gifts, using them to further the ministry of Christ. In 2002, Joyce established a deferred charitable gift annuity. In exchange for her gift of \$10,000, she received fixed annuity payments of \$770 per year, beginning two years later, when she retired for the last time! At the time of her death in September of 2008, \$4,397.99 of the remainder in her charitable gift annuity account was distributed to Garrett-Evangelical Theological Seminary to provide scholarships for Wisconsin Conference students attending seminary at G-ETS and another gift of \$4,397.99 was distributed to the Bishop's Relief Fund invested by the Foundation.

A charitable gift annuity is a form of charitable giving that is part **gift** – a contribution of money or property to a church or ministry – and part **annuity** – an arrangement under which the Foundation agrees to pay the donor(s) fixed payments for life.

At the death of the last designated annuitant, your church or the designated ministries receive 80% of the funds remaining in the annuity account. The final 20% remains in the Foundation's annuity reserve account. A charitable gift annuity can be established through the Foundation for **\$2,000 or more.**

The annuity rate is determined by the age of the annuitant(s) at the time the donor(s) create the annuity.

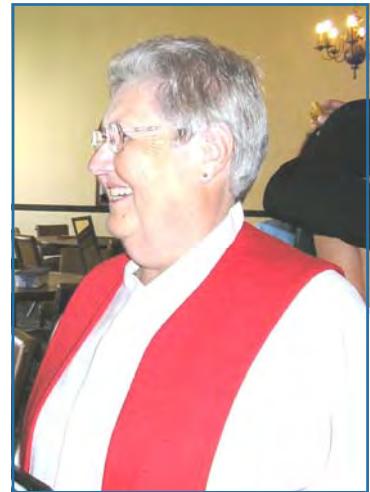
Please contact Bill Helwig or Jean Ehnert Nicholas at

1-888-903-9863 to determine how a charitable gift annuity might be advantageous to you. Under absolutely no obligation, you can receive personalized information to assist you in making important decisions about this wonderful opportunity to give.

Joyce Alford was instrumental in encouraging many clergy and laity to tithe and give regularly to the ministry of Christ.

Upon her death, we also learned that 10% of the residual portion of her estate was given to the Foundation to be distributed equally as an undesignated gift to (1) the church where she held her charge conference membership and (2) to the Wisconsin Annual Conference.

Have you included the church in your will or estate plan? For more information on using a Letter of Instruction to distribute a portion of your estate to the Foundation, for further distribution to any United Methodist ministry or qualified charities, call our office today at **1-888-903-9863** or send us an email to **wumf@wumf.org**.



*Rev. Joyce Alford*

**Money is like manure;  
It's not worth a thing unless it's  
spread around encouraging young  
things to grow.**

*- Thornton Wilder*

# Charitable Giving

## Every Gift Makes a Difference!

Have you been to Pine Lake Camp lately? This spring there was a wonderful celebration to dedicate the completion of the fourth wing of rooms in the Bishop Sharon Rader Retreat Center. This event reminds us of how many of our church's ministry and programs are the result of generous and sacrificial gifts.

There's another special "jewel" tucked away in the trees at Pine Lake Camp, the **Susanna Wesley House**. This place of retreat features four bedrooms, a full kitchen, dining area, and a place to gather around the floor to ceiling stone fireplace.

The Susanna Wesley House is here because of the generous gifts of Charles and Mary Friederich in 1999 and 2000. In reviewing their situation in the early years of retirement it became apparent to them that they had the perfect circumstance in which to consider a charitable gift with highly appreciated stock that had to be sold.



*Susanna Wesley house sits nestled in the trees at Pine Lake Camp*

They also wanted to make a gift that would provide a place of rest and retreat for Licensed Local Pastors, UMW officials, and missionaries. Working with the Wisconsin United Methodist Foundation over a two year period, they were able to make a gift of \$100,000 to Pine Lake Camp resulting in this special house of renewal and rest. As donors, Charles and Mary were also able to receive charitable deductions and bypass capital gains taxes. When not in use for those special persons or families, the home serves as a day-use facility for retreats, meetings, seminars, or family gatherings. In the words of the Friederichs, "It is our prayer that the Susanna Wesley House will contribute to the ministry of Pine Lake Camp for many, many years to come."

### SOME SELECTED CHARITABLE GIFT ANNUITY RATES

**One Life**

**Two Lives**

Age 60	5.2%	Ages 60 & 60	4.9%
Age 65	5.5%	Ages 65 & 65	5.1 %
Age 70	5.8%	Ages 70 & 70	5.4%
Age 75	6.4%	Ages 75 & 75	5.7%
Age 80	7.2%	Ages 80 & 80	6.3%
Age 85	8.1%	Ages 85 & 85	7.1%
Age 90+	9.5%	Ages 90 & 90	8.3%

### New and Higher Rates for Charitable Gift Annuities in Effect

New and higher rates for Charitable Gift Annuities went into effect on July 1, 2010. These rates will be in effect for one year. If you believe God is calling you to establish a CGA, call the Foundation office today and ask for a [Charitable Gift Annuity Application](#). A Charitable Gift Annuity is a form of charitable giving that gives donors the opportunity to make a gift to a particular ministry or local church, and receive a fixed annuity payment for the rest of their lives. Call us today at 1-888-903-9863 for more information on how you can take advantage of this wonderful way of giving.

## Scholarship Recipients



Josh Tyjeski  
Beaver Dam: Trinity  
UW Stevens Point



Charles Martin-Stanley  
Onalaska UMC  
Luther College



Caitlin Lindsay  
Milw: Kenwood  
UW Stevens Point



Luke VandenLangenberg  
Eureka UMC  
UW Madison



Laramie Wieseman  
Lake Geneva UMC  
Beloit College



Amanda Felle  
Racine: Evangelical  
UW-Oshkosh



Lindsey Groves  
Borth UMC  
UW Stevens Point



Charlotte Stanford  
New Auburn UMC  
UW River Falls



Elizabeth Whitford  
Shullsburg: Centenary  
UW Platteville



Heather Harrison  
Green Bay: First  
Northland College



Katie Barman  
Marshall UMC  
Marquette



Joylin Sampath  
Phillips UMC  
Milw Sch of Engineering

**THANK YOU** to our donors for making these scholarships available! The WUMF scholars awards are sponsored by folks like you that are interested in supporting the education of bright United Methodist students. Your gifts, combined with others, make possible a scholarship of \$500 to \$1000 in recognition of a student's many gifts, academic efforts and lived-out examples of servanthood. To help ensure the continuation of this program, send your gifts to WUMF or call Rev. Bill Helwig at 1-888-903-9863 to discuss your role in the scholarship program.

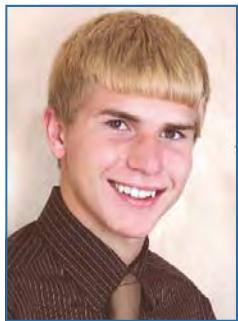
## Scholarship Recipients



Kim Hanson  
Baraboo: Emanuel  
UW Platteville



Bryce Iverson  
Oconto Falls  
UW LaCrosse



Kevin Teutschmann  
Shullsburg: Centenary  
UW Oshkosh



Kari Andrews  
West Allis: First  
UW Milwaukee



Francisco Nolla  
Racine: Christ  
UW Milwaukee



Katherine Reddy  
Menomonee Falls:  
Emmanuel  
Bradley Univ



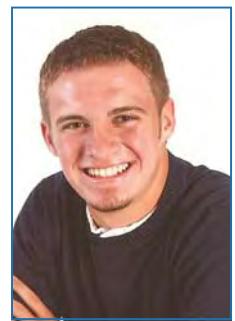
Greg Schumacher  
Menomonee Falls:  
Emmanuel  
Univ of Iowa



Kelsy Hribar  
Waunakee:  
Crossroads  
UW Whitewater



Kristin Hildebrandt  
Racine: Trinity  
Cornell College



Alan Smith  
Dodgeville  
UW LaCrosse

**The next scholarship  
deadline is  
April 1, 2011.**

Scholarships are granted each year from scholarship endowment funds established through generous gifts from individuals and families. Scholarship recipients are selected based upon leadership and involvement in church, school, and community life. The next scholarship deadline is April 1, 2011. There is a common application for most of these scholarships. Check [www.wumf.org](http://www.wumf.org) for more information!

## Investment Services

### Now where did I put that statement?

Picture this...It's very late on a Tuesday afternoon. You have a Finance committee meeting tonight and it's your job to report on the funds that your church has invested with the Foundation. If only you could remember where you had filed the last quarterly statement! You call the WUMF office. They are such nice

people and always eager to help. But, alas, they are all gone for the day. Now what? Well, this month you might be stuck. But you can make sure that never happens again! Follow these easy steps to have on-line access any time of day! (1) Go to [www.wumf.org](http://www.wumf.org) and look under the **Investments** tab. (2) Then use the drop down to the **Forms** tab. Scroll down to the middle of the page to the **Authorization for On-Line Access** link. (3) Print out the form, or complete it right there with an electronic signature. Your church can have as many people with access to the information as necessary. Someone may have access to all or just some of the accounts. (**Remember, this is just the statement, not granting access to the funds.**) Get it signed then fax, mail, or email the electronic form. You will receive an email when

you have been entered into the system. You will be given a random password. It may be helpful to change it to something you can remember. Soon you will be the envy of all at the meeting!

**WUMF Offers:**

**Investment Service** for local United Methodist Churches. We provide a careful and conservative investment approach for church money offering competitive returns, accountability, and permanency.

**Capital Campaign Services** tailored to your congregation.

**Endowment Services** for churches to develop permanent funds and raise awareness of how contributing to these funds can enrich ministries.

**Mortgage Loans** designed for qualifying churches, offering low interest rates and flexible terms.

**Grants** to churches or agencies for new and creative ministries throughout Wisconsin.

**Planned Giving Services** to individuals so they can make a lasting impact on ministries that are important to them. When meeting with individuals, our first question is, "What are your goals?"

**Stewardship Services** to help congregations develop a year-round stewardship program that will secure the financial resources required to continue and expand ministries.

**Assistance** to the wills, memorials, and estate planning programs in your church.

## Church Loans and Capital Campaigns

### This too shall pass! But then what?



*Plainfield UMC's loan helped with several building repairs, including these curling shingles*

Our Wisconsin summer weather has been unusually hot and humid with dousing rains, heavy winds and unpredictable hail. We can be certain though, that this season shall pass and relief will be found in the welcoming cool of a crisp fall morning. A respite indeed; a calm before the storm of a harsh Wisconsin winter. It will come, and although we can't prevent it, we all certainly prepare for this inevitable frozen season of ice and snow.

How does your church prepare to weather these seasons? Are bucket laden hallways solving the leaky roof problem? Are deep puddles hiding the potholes of your crumbling parking lot? Will woolen coats and gloves be necessary in the sanctuary to compensate for drafty windows and an aging boiler?

Autumn is the perfect time to address your church's needed repairs. If your church needs additional financing to complete these projects, the Foundation's loan program may be the solution. We provide loans for building and parsonage repairs as well as for construction and refinancing. Competitive interest rates and flexible terms are highlights of the Foundation's loan program. Call our loan officer, Ellen La-Wall, at **1-888-903-9863** to learn how a Foundation loan can serve your church's needs. See the latest loan rates below or check our web site [www.wumf.org](http://www.wumf.org) for current rates which are updated every Tuesday.

If your church needs more funds than it should safely borrow, or doesn't wish to incur debt, call Lenore Geisthardt, Capital Campaign Coordinator, to talk about a Faith Funds capital campaign. This process is designed to help raise funds for these very focused projects such as boilers, roofs, and parking lots. The Foundation will provide important assistance to your church to structure your campaign. Remember, a church can expect to raise more money in a campaign when outside assistance is used.

**Church Loan Rates as of August 10, 2010**

<b>1 year:</b>	<b>3.375%</b>
<b>3 year:</b>	<b>3.625%</b>
<b>5 year:</b>	<b>4.00%</b>
<b>10 year:</b>	<b>5.125%</b>
<b>Line of credit 4.00%</b>	

Call today!



*Do you need to raise funds to repair the church roof?*

Wisconsin United Methodist Foundation  
750 Windsor Street, Suite 305  
PO Box 620  
Sun Prairie WI 53590-0620

Non-Profit  
Organization  
U.S. Postage  
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Sun Prairie, Wis.  
Permit No. 28

**PASTORS, LAY LEADERS, COUNCIL CHAIRS, FINANCE & STEWARDSHIP TEAMS:  
PLEASE JOIN US TO LEARN INSIGHTS AND TOOLS  
FOR INVITING YOUR CONGREGATION  
TO GIVE WHOLEHEARTEDLY IN 2010.**

# **EXTRAVAGANT GENEROSITY**



## **with Dan Dick**

**SEPT. 17: FIRST UMC, BARRON, 9 AM - 3 PM  
SEPT. 18: ST. PAUL's UMC, STEVENS PT. 9 AM - 3 PM  
SEPT. 19: DODGEVILLE UMC, 2 - 6:30 PM  
NOV. 5: BETHANY UMC, GREEN BAY, 9 AM - 3 PM  
NOV. 6: CROSSROADS UMC, WAUNAKEE, 9 AM - 3 PM  
NOV. 7: COMMUNITY UMC, WATERFORD, 2 - 6:30 PM**

**COST: \$20/PERSON, MAXIMUM \$60/CHURCH**

**REGISTER TODAY AT [WWW.WUMF.ORG](http://WWW.WUMF.ORG) OR CALL 1-888-240-7328**