

FALL
2009

Legacies

UNITED
METHODIST
FOUNDATION,
INC.



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2009 Saints of God Stewardship Award:

*The Children of Macedonia
United Methodist Church*

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1307 Glenwood Ave
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800-555-4718 / 919-836-0029

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www.umf-nc.org



L to R: W. Daniel Pate, L. Milton Whaley, and Lynn James

In Appreciation For Lloyd Milton Whaley

Lloyd Milton Whaley has served with distinction as a member of the Board of Directors of the United Methodist Foundation, Inc. since 1991, completing six successive three-year terms for a total of 18 years. He served as president of the United Methodist Foundation, Inc. for seven years from 1996 to 2003 during which time he led the Foundation with remarkable clarity of purpose and effectiveness. Seeing the critical need to restructure the Board into a smaller, more workable entity, he focused the Board's attention on this issue until successfully completed.

Milton Whaley has generously given the highest quality of servant leadership marked by his determined faithfulness and gracious courtesy which he extended to us all earning the respect and esteem of church leaders throughout the North Carolina Annual Conference.

L. Milton Whaley:
18 Years of service
to the UMF

We are truly and personally grateful to Milton for the extraordinary time and support he freely gave to us over the years.

On behalf of the Board of Directors and staff of United Methodist Foundation I extend to Milton our deep and grateful appreciation for his effective, unselfish and outstanding servant leadership during his 18 years of service. We hope that we may continue to count on his friendship, counsel and support far into the future. Our very best wishes go with Milton and once again express to him our debt of gratitude for his service and dedication to the United Methodist Foundation, Inc.

ON THE COVER:

NC Annual Conference photo of the Children of Macedonia UMC - the 2009 Saints of God award recipients - with Bishop Gwinn (front kneeling), UMF Director Lynn James (rear left), and Stephen Compton, Sanford District Superintendent (rear right).

A Celebration Worth Sharing

I. Lynn James
UMF Director

It is a pleasure and a privilege to share the wonderful news that Rev. Jim Mentzer, Director of Planned Giving for United Methodist Foundation and Elder in Full Connection with the North Carolina Annual Conference, is now the Reverend Doctor James G. Mentzer.

Instilled with a strong *spirit for learning* by his parents, Jim developed an inner drive to achieve excellence in education. This inner drive gave Jim the strength and determination to pursue his goals through his undergraduate studies at Allegheny College in Pennsylvania; his graduate studies at Duke University where he earned a Masters in History, as well as his Masters of Divinity degree from Duke Divinity School, and finally his Doctor of Ministry degree awarded this past May 31st from Union Theological Seminary in Richmond, Virginia.

Jim joined the staff of United Methodist Foundation, Inc. as Director of Planned Giving in June 2006. Prior to that, Jim gave of his time as an advisor to me sharing his perspective not only as clergy, but as a financial professional as well. Since then, Jim has made many significant contributions to the success of the stewardship ministry of the United Methodist Foundation, strengthening its services and its leadership, and helping to build its relationship and connection to the member churches, agencies and institutions and clergy of the Conference.

Key to the United Methodist Foundation's success as a stewardship ministry is its need to be in a relevant "connected relationship" of faith and service -- a faith partnership, if you will -- with the local church. To this end, Jim has given the mission and stewardship ministry of the United Methodist Foundation the wonderful gift of his leadership. This is evident through his past professional knowledge and financial expertise, his strong faith foundation as a clergy member of our Conference and his wonderful demeanor that quickly puts others at ease and encourages confidence in his advice.



Dr. Mentzer with his parents Francis and Beverly Mentzer

Jim is not only a partner in service to all the churches, agencies and institutions of this Conference; he is also a good friend in service for which I am very grateful.

Jim offered this rather humble response when asked about his feelings now that he has accomplished this significant achievement: "It's still strange hearing someone call me 'Dr. Mentzer' -- my first inclination is to turn around to see who just walked into the room. This degree is certainly not required to become a United Methodist pastor. However, it certainly falls within a Wesleyan understanding of ministry which values education and calls upon pastors to continually seek to learn after ordination."

Please join with me, the staff and Board of Directors of your United Methodist Foundation in extending our combined congratulations and appreciation to the Reverend Doctor James G. Mentzer.



The Children of Macedonia United Methodist Church

raised over \$800 - enough to purchase 28 pigs - and hopes to raise much more.

For the first time ever, a ministry conducted by children received the Saints of God Stewardship Award presented annually by United Methodist Foundation, Inc.

The 2009 award, offered to those who exhibit outstanding Christian stewardship and service within the North Carolina Annual Conference, was awarded to the children of Macedonia United Methodist Church of the Sanford District for their “Pennies For Pigs” campaign.

In response to photos and videos taken by Rev. Ron Scott during a 2008 mission trip to Rwanda, the children of Macedonia UMC began to collect pennies to assist the orphaned children of Africa through ZOE Ministry's Giving Hope Empowerment Project. To date, “Pennies For Pigs” has

According to Rev. Scott, the children are excited to be able to help children in Africa and to know they are fulfilling the gospel message from Matthew 25:40 *“Truly I tell you, just as you did it to the least who are members of my family, you did for me”* (NIV).



2009 Saints of God Stewardship Award Recipients

And, when an orphan receives the gift of an animal, they then have an income-generation opportunity through the sale of offspring as well as fertilizer for gardens.

The idea for the fundraiser was born after Macedonia's pastor, the Rev. Ron Scott, visited

Rwanda in September 2008 with ZOE Ministry founder, the Rev. Greg Jenks, a clergy member of the NC Conference and missionary. During the visit, Scott was inspired to see children raising their siblings in abject poverty. Through ZOE Ministry's Giving Hope project, they are taught life-skills and offered the support needed to overcome their circumstances and provide for their families.

This year's Saints of God Award will include a monetary gift that will double the funds raised by the children of Macedonia UMC.



They hope to use these funds as “seed money” to raise additional funds for the orphaned children of Rwanda.

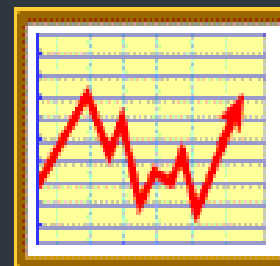


The Saints of God Award was established in 1994 by Raleigh resident Gordon Smith III in memory of his mother, Jean Poe Smith. Each year the award recognizes outstanding Christian stewardship and service at various levels within the North Carolina Annual Conference. The award takes its name from the familiar hymn “I Sing A Song of the Saints of God.”

UMF INCOME FUND

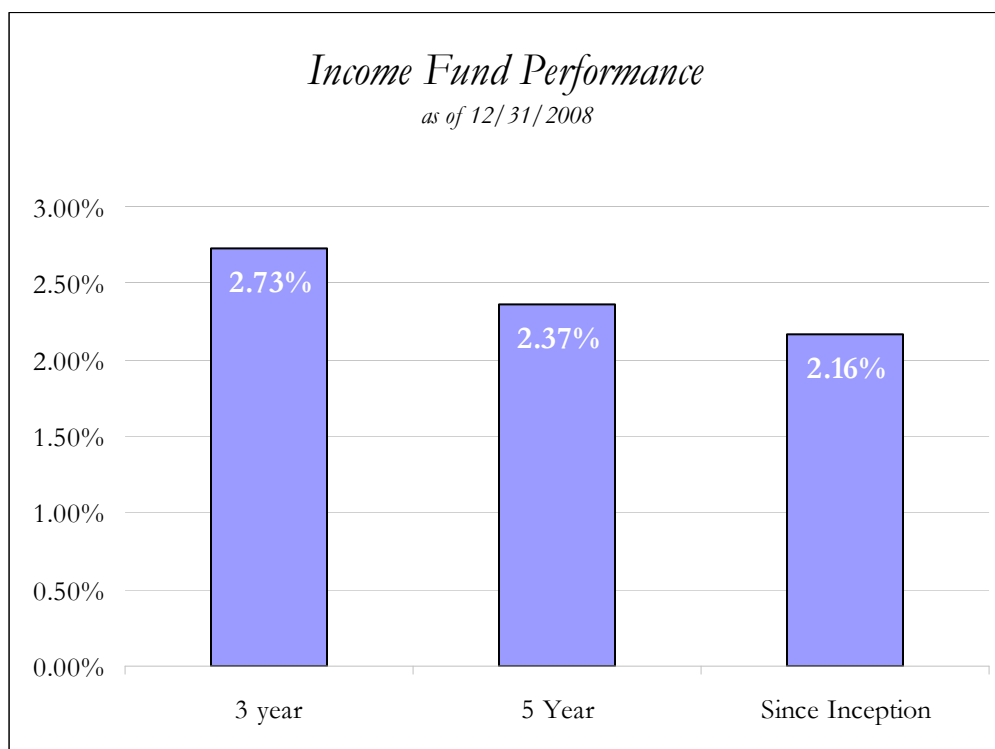
<i>Year</i>	<i>Total Earnings</i>	<i>Average Ending Equity Balance</i>	<i>Return Rate</i>
2004	\$ 93,072.00	\$ 3,847,454.00	2.42%
2005	\$ 47,378.00	\$ 3,805,766.00	1.24%
2006	\$ 73,538.00	\$ 4,011,237.00	1.83%
2007	\$ 284,800.00	\$ 3,489,665.00	8.16%
2008	\$ (64,635.00)	\$ 3,558,292.00	-1.82%
2009	\$ 364,879.00	\$ 3,660,295.00	9.97%

Thru 9/30/09



About Investing with the Foundation

The figures shown represent the Total Return on Investment (net of all fees) for the Foundation Fund investments for the stated periods. These figures are not an indication of future earnings or future fund performance. Investment Partners may have multiple accounts. Each account is accounted for separately and owns a specific number of Investment Units.

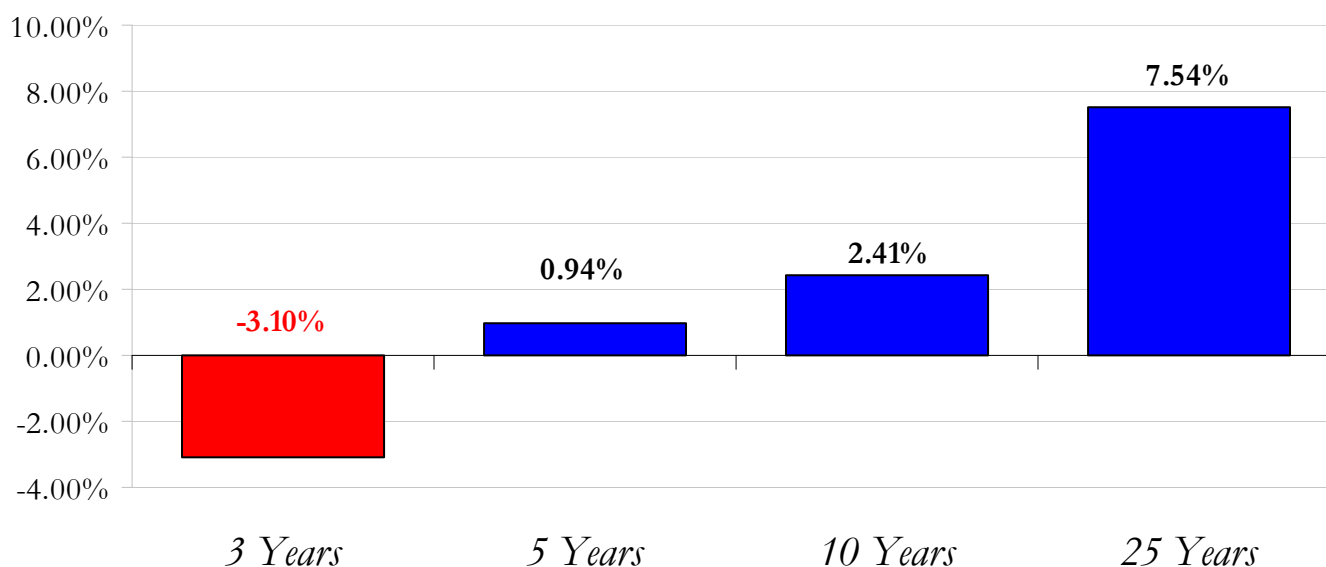


UMF BALANCED FUND

<i>Year</i>	<i>Total Earnings</i>	<i>Average Ending Equity Balance</i>	<i>Return Rate</i>
2002	\$ (5,157,797.00)	\$ 57,397,044.00	-8.99%
2003	\$ 10,557,101.00	\$ 55,889,940.00	18.89%
2004	\$ 5,631,752.00	\$ 64,954,340.00	8.67%
2005	\$ 3,784,056.00	\$ 70,962,121.00	5.33%
2006	\$ 8,815,115.00	\$ 84,281,046.00	10.46%
2007	\$ 4,967,857.00	\$ 94,736,453.00	5.24%
2008	\$ (21,966,524.00)	\$ 87,897,740.00	-24.99%
2009	\$ 12,129,601	\$ 80,771,390.00	15.02%

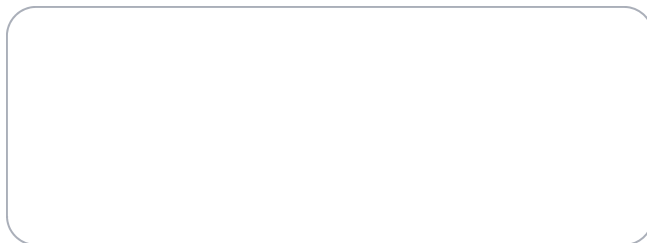
Thru 9/30/09

Average Annual Return On Investment (Net of Fees) *as of 12/31/08*






United Methodist Foundation, Inc.
 PO Box 10955, 1307 Glenwood Ave., Ste. 153, Raleigh NC 27605
 (919) 836-0029 • (800) 555-4718 • Fax (919) 836-0092
www.umf-nc.org



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United Methodist Foundation, Inc.

Planned Giving and Socially Responsible Investing for the North Carolina Conference

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A Stewardship Ministry

Established in 1955, United Methodist Foundation, Inc. is a stewardship ministry of the North Carolina Conference of The United Methodist Church.

UMF was founded with the vision to serve all churches, institutions and agencies in the NC Conference, acting as trustee for a variety of accounts including church building funds, mission endowments, and scholarships.

These accounts begin through the visionary leadership of those who care deeply about leaving a legacy for future generations.


Planned Giving Education

United Methodist Foundation, Inc. offers Endowment Program and Planning Giving consultation services.

The Endowment Program's stewardship consultations help local churches and Conference institutions establish permanent endowment programs.

UMF consults with individual donors establishing permanent or long-term planned gifts to benefit ministries of the Church. This donor-focused service helps donors create the gift plan most appropriate for their situation. UMF works cooperatively with the donor's legal, tax and financial advisors.

Socially Responsible Investment Management



L-R: Board member Milton Whaley, Ran Few, and UMF's Executive Director, Lynn James

Remembering Randolph (Ran) Few

Oct. 6, 1920 - Oct. 14, 2008


In recognition of his "servant heart," Durham resident Randolph R. (Ran) Few received the 2008 Saints of God Stewardship Award for "Outstanding Christian Stewardship and Service within the North Carolina Conference."

"Ran recognized the vital role that 'family' has in the lives and ministries blessed with his leadership over the years," said Lynn James, executive director of UMF. "Although much of his work was behind the scenes, his impact has been visibly apparent and clearly witnessed at the critical point where mission and ministry meet need. For this and so much more we will be forever grateful for our friend, Ran Few."

Ran was a life-long member of Duke Memorial United Methodist Church where he was active in church leadership. Within the NC Conference, Ran was a member of UMF's Board of Directors for 26 years. He also chaired the NC Conference's Council of Finance and Administration, served on the

Weekly Article

Setting Goals for Your Family and Estate



"How can I plan?" asked Mary Wilson. "We just sold our home and bought a retirement condo. Our older child just moved across the country and our younger child will be getting married later this year. With so much change, how can we make plans?"

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UMF News

- [Setting New Goals](#)
- [Peace of Mind Gift Annuity](#)
- [A Bequest to Further Good Work](#)

Special Focus

Living For Giving