



Faith-Based Financial Solutions for Investing, Lending, Training, and Planned Giving

Good Governance Models Are Essential to Elevating and Advancing Mission



By Mathew A. Pinson, Georgia United Methodist Foundation President and CEO

Take a few minutes to think about the best volunteer experiences you have had in your lifetime. These outstanding experiences were likely the direct result of leaders' unwavering focus on the organization's mission. This focus, careful planning, responsive evaluation, and a carefully cultivated volunteer and donor base are a few elements that lead to healthy and sustainable nonprofits, including churches. Importantly, all of these elements are the direct results of a good governance model.

Good governance models are essential to elevating and advancing the mission of all organizations. Because of this, I spend time each week focused on the governance model of the Georgia United Methodist Foundation. On any given week, topics related to governance are front and center. But what exactly do I mean?

The Foundation's purpose is to partner with churches, nonprofits, individuals, and families in direct support of the ministries and mission of the church. In this way, the Foundation is a ministry partner as we seek to live out our mission to provide faith-based financial solutions for investing, lending, training, and planned giving. Undergirding the Foundation's purpose and mission is a governance model that is key to the organization's overall success. Below are a few examples of how I focus my time on topics related to governance that directly elevate and advance the purpose and mission of the Foundation:

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**Save the Date: Investment Forum With
Wespath Institutional Investments October 19**



Are you interested in a global market update from Wespath, manager of one of the largest faith-based pension funds in the world? Together, Wespath and its subsidiaries, including Wespath Institutional Investments, manage over \$24 billion in assets.

The Georgia United Methodist Foundation is the exclusive distributor of the I Series of the Wespath Institutional Investments funds to United Methodist churches and nonprofits in the State of Georgia. On **Wednesday, October 19 at 12 noon**, Foundation President and CEO Mathew A. Pinson will host a 45-minute complimentary webinar featuring Wespath Chief Investment Officer Dave Zellner and Director, Institutional Relationships Karen Manczko. The agenda includes:

- Welcome and Introductions
- About the Georgia United Methodist Foundation
- Wespath Institutional Investments Overview and Review of the Foundation's Investments
- Market and Economic Updates
- Questions and Answers
- Conclusion

To join the webinar on October 19 at 12 noon, please click the link below: <https://us02web.zoom.us/j/85271939514>.

Registration is not required.

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Warren Memorial UMC Senior Pastor Encourages Churches to Make the Foundation Their First Call



From left: Foundation Senior Advisor to the President and Director of Lending Jim Pope, Warren Memorial UMC Senior Pastor the Rev. Leon Matthews, Trustees Chair Sandra Harrell, and Finance Committee Chair Ray McLendon

During his 43 years in ministry, the Rev. Leon Matthews has provided leadership at the local church, district, and annual conference levels. He remembers the people who

mentored and coached him and considers it a blessing whenever he can give back and help others in return.

In June 2018, Matthews was appointed senior pastor of Warren Memorial UMC in Atlanta. Last year, the church obtained a loan from the Georgia United Methodist Foundation to renovate and update its facilities. In this Q&A, Matthews felt it was important to share his testimony working with Jim Pope, Foundation senior advisor to the president and director of lending, in case it helps other churches with financial or construction needs.

Q: Why did Warren Memorial UMC need a loan?

The Rev. Matthews: The loan from the Foundation is enabling us to construct two new bathrooms, renovate the current bathroom space, and enhance the internal structure of the church with new security, audio-visual equipment, and fire alarm capabilities.

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Congratulations to Our 2022-2023 Scholarship Recipients!



The Georgia United Methodist Foundation would like to congratulate the 38 students who received United Methodist Dollars for Scholars scholarships for the 2022-2023 academic year! The Foundation partners with donors, local churches, participating United Methodist-related schools, and the United Methodist Higher Education Foundation to award matching UM Dollars for Scholars scholarships valued at up to \$4,000 each year.

In addition to these UM Dollars for Scholars scholarships, the Foundation also manages endowments where the scholarship funds are sent directly to colleges, universities, and seminaries. Since 2011, the Foundation has awarded **over 900 scholarships totaling nearly \$800,000**.

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QCDs and Gifts via Retirement Accounts



For consideration...

It is always possible to donate retirement assets, including IRAs, 401(k)s, and 403(b)s, by cashing them out and contributing the proceeds to charity. However, this approach brings considerable tax implications. Importantly, a direct contribution of retirement assets to charity as part of an estate planning strategy can be very tax efficient. In some situations, it can also mean more funds for charities and intended heirs.

For many people, a retirement account like an IRA or 401(k) may be the most significant source of assets accumulated in their lifetime. However, others may find that they do not need all the funds accumulated in their retirement accounts due to their other resources and investments. For those who wish to give to charity, a natural question is whether they can donate retirement assets — and if there are any tax advantages. Qualified Charitable Distributions (QCDs) offer a tax-advantaged way for individuals over 70 ½ to make contributions to their church or other qualified charity. Using a QCD requires that the individual(s) have a tax-deferred savings plan such as an IRA.

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Stewardship Resource for Church Leadership To the Point: Pastors Can Help the Wealthy Achieve Goals



This article written by Christopher F. Poch is reprinted by permission from Leading Ideas, a free e-newsletter from the Lewis Center for Church Leadership of Wesley Theological Seminary and available at churchleadership.com.

Working with hundreds of families address the issues of philanthropy, I have seen what works. Pastors who understand the process can help families achieve their goals through your ministry.

Begin by understanding the potential donor's goals and aspirations. Frame your thoughts from the perspective of how donors can facilitate a "greater good." Then probe if there is something they are considering but have not yet done. Open a conversation to explore possibilities.

You are a conduit. Many people with resources don't have the time or skills required to make the positive impact they desire. Your ability to connect their resources with the outcome is essential. Don't be shy in helping people see how it can be done.

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You Are Invited to Sign-up Today!



The Georgia United Methodist Foundation is adding to the digital resources offered through gumf.org. We are enhancing our monthly e-newsletters and weekly planned giving e-newsletters and adding additional resources to the website. Digital publishing provides greater flexibility, allows us to connect with our readers instantly, and enables the Foundation to maximize resources in support of our purpose and mission. Please know that we will continue printing and mailing our *Annual Report* and select *Faith & Money* newsletters during the year. Below you will find five reasons why you should sign up to receive the Foundation's digital resources. **Sign-up is easy. Visit www.gumf.org/stay-connected, e-mail info@gumf.org, or call 770-449-6726.**

1. Convenience! You can read the latest news from the Foundation on your computer, smartphone, or tablet anytime.
2. Receive the latest news and trusted resources on investments and the U.S. and global financial markets.
3. When you read an article or find a helpful resource you like, you can immediately forward it to your friends.
4. When you connect with the Foundation via email and online, you receive instant access to new certificate rates.
5. Utilizing digital content enables us all to be good stewards of the resources entrusted to us by God.

You are invited to sign-up today!

SIGN-UP FOR DIGITAL

September 2022 Certificate Rates

| Certificate Terms | Rates |
|-------------------|-------|
| 1-Year | 1.50% |
| 2-Year | 2.00% |
| 3-Year | 2.50% |
| 4-Year | 2.75% |

The Georgia United Methodist Foundation offers fixed-rate certificate investments, which in turn provide funds for loans to United Methodist churches and nonprofits. The September 2022 rates are listed below by maturity.

1-Year = 1.50%

2-Year = 2.00%

3-Year = 2.50%

4-Year = 2.75%

**A minimum deposit of \$5,000 is required. Rates as of September 2022. All rates are subject to change without notice. Call the Foundation at 770-449-6726 for current rates. Certificates are not insured by the FDIC or any other government agency and are not obligations of or guaranteed by a bank. This ad*

constitutes neither an offer to sell nor a solicitation to buy the securities described. Offers are made only after receiving an [Offering Circular](#).

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A Reassuring Word From the Foundation



In this brief video, Georgia United Methodist Foundation President and CEO Mathew A. Pinson and Regional Vice President Dr. Rick Lanford reassure our partners about the Foundation's ability to serve the entire Methodist family of Georgia.

[PLAY VIDEO](#)

Labor Day Holiday Closing



In honor of the Labor Day Holiday, the Georgia United Methodist Foundation's offices will close at 2:30 p.m. on Friday, September 2. Our offices will reopen at 9 a.m. on Tuesday, September 6.

Contact Our Team



As a leading financial partner, our question will always be how can we best help you, your family, your church, or your nonprofit to achieve your mission and live out the call of God in your life and the life of the community where you live and serve. To learn more, please contact our team at 770-449-6726, 478-256-7130 (South Georgia), or info@gumf.org, visit gumf.org, or watch “Our Purpose is Your Mission” video [here](#).

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