

It is Said That in Life, Timing is Everything...

Evaluating Cash Needs

Church accounts are invested in common trust funds that are valued once a month. Withdrawals from accounts invested in Money Market will be processed immediately upon receipt of your request. Requests for withdrawal from accounts invested in any of the other Foundation Model Portfolios need to be received by the last business day of the month in order for a check to be cut within the first three business days of the following month. The deadline applies to written or faxed requests.

Stock Transfers



Year-end is a popular time for donors to review their financial situation and gift planning options. Many individuals utilize gifts of stock to accomplish philanthropic goals. Stocks held in brokerage accounts can be transferred electronically, making the gifting process simple and relatively quick. Paper stocks on the other hand, must be in "good order" to transfer properly. (Transferring stock certificates to a personal brokerage account will speed up the gifting process in the future.) If you would like to receive a tax-deduction for 2010, initiating the gift transfer in early December is the best practice. If you need more information about gifting stock, please call Judy Vining at 800-595-4347 ext. 101.

Stories from the Road - by Gary Melville, Director of Development

The Endowment Committee of St. Matthew's UMC in Acton has worked hard the past couple of years writing an endowment policy and creating the Wheeler Minuteman Legacy Fund that will generate income for mission and ministry beyond their budget. I was invited to provide an estate planning workshop after church to promote the Wheeler Minuteman Legacy Fund and begin the education process about gift and estate planning. The workshop was planned by accident, or more likely, by the Holy Spirit to take place on World Wide Communion Sunday. Serendipity would have the youth group leaders (Rev. Herb Taylor and wife Sarah) lead a contemporary worship service where they and the eight members of their mission team shared their life changing experience working with a sister United Methodist Church in Puerto Rico. Their stories of love and seeing



St. Matthew's Mission Team in Puerto Rico

the Holy Spirit at work were a powerful witness that the "Church" is alive and doing well.

I was struck, looking through my Foundation Faith & Money lens, at how the worship service so beautifully demonstrated why church members need to make endowment gifts, both current and planned. Life changing encounters with Christ often happen when we see Jesus in others. Too often though, we are so busy with life and the demands of work and school that we fail to see Jesus' face in the crowd, or even in the mirror. Sometimes it takes time away - a retreat, a camp experience, a mission trip - to help provide the space God uses to soften our

hearts enough for the Spirit to take root. Creating that space is intentional and often takes money that is not in our budgets, either church or personal. When someone asks why they should include the church in their Will, or make it a beneficiary of their IRA account, or life insurance, I say *because it will most definitely change your life*. That's why the church endowment is so critical. And... if you need witnesses?... St Matthew's has eight of them.

FOUNDATION STAFF - CONTACT INFORMATION

**Knowing which person you need to contact will expedite your call.
You may dial an extension at any time during the automated message.**

Ext: 100 – Leanne Mentzer – *new loans, general account information*

Ext: 101 – Judy Vining – *account information, stock transfers, quarterly statements*

Ext: 102 – Chris McGuire – *publications, newsletters, web site*

Ext: 103 – Gary Melville – *planned giving, endowment policies, stewardship*

Ext: 105 – Doris Connors – *accounts payable, existing loans*

Ext: 106 – Bonnie Marden – *stewardship education & planned giving*

Ext: 107 – Dan Hussey – *loan officer*

Ext: 112 – Pam DiMartino – *trust accounting, Foundation finances & administration*