

# Marketing Your Endowment Program

*A Resource Guide for Local Churches*





**T**his Marketing Handbook is a companion publication to the Foundation's Planned Giving Handbook. Like that publication, it is designed to help local churches create and maintain a successful permanent endowment program. The strategies outlined in this handbook can be effective when implemented as part of an overall marketing communications plan. We encourage you to study this handbook and to adapt these ideas as needed.

Successful communications takes vision and dedication. Most likely, you will find interesting strategies of your own to illustrate the many ways planned giving can make a difference in the life of your church. Please feel free to share your thoughts with us. If you have questions or comments, please direct them to:

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# Why Market Your Endowment Program?

Setting up an endowment program is a big step for most churches. It requires vision, hard work and dedication. However, once the program is set up, many of us adopt a *Field of Dreams* mentality. To paraphrase a famous line from the popular 1989 movie, we naively assume “if we build it, they will give.” If that were true, every church endowment would have all the funds it needs. The reality is that creating an endowment program is only the first step. Marketing the program is what makes the endowment grow.

In simple terms, your marketing plan should have three major areas of emphasis: communication, education and celebration.

**Communicate.** Do let people know what you are doing and why. Don't just mention the endowment program once in a while. Remind people of what it can do for them and for the church. Endowment giving should be part of the overall stewardship or giving emphasis of the church, and, as such, should be mentioned in any communication —spoken or written —about giving. Let people know that there are creative ways to give to the church; ways that may help stretch their “giving dollars.” Omitting planned giving as an option from your ongoing stewardship communications materials only translates into lost opportunities.

**Educate.** Planned Giving is a complex topic. Don't assume that everyone automatically knows what it is. Your marketing materials and/or presentations or workshops must clearly explain the benefits of planned giving. They also should attempt to dispel any myths or misperceptions about planned giving. For example, many people believe that planned gifts are just for the most affluent church members. Truthfully, planned giving is an option that everyone should consider. Plan at least one educational workshop a year.

Estate planning and/or end of life planning are essential elements of financial planning. Let people know why is important— if not imperative —to have a will. Foundation staff members are available on a pro bono basis to talk about planned giving and estate planning, and many churches have members who are financial and estate planning experts as well. Some churches offer faith-based financial literacy programs. Learning to manage one's assets and to care and plan for one's heirs is a vital part of comprehensive Christian stewardship.

**Celebrate.** Let church members know how the endowment program is doing. When new gifts come in, thank donors publicly, if possible, but respect the privacy of those donors who prefer to make anonymous gifts. You can acknowledge the gift and thank the donor without necessarily revealing the person's identity. There are many ways to report on the annual growth of your endowment program. Many churches plan a special event honoring donors. Some churches publish an annual report. Some do a combination of both.

The Foundation has a donor recognition program called *The Mustard Seed Society*. Membership is open to anyone who has made a planned gift to their church. Members receive a Mustard Seed Society pin and a certificate signed by the bishop, foundation president and local pastor. The Foundation is happy to make these materials available to local churches.

We encourage every church to develop an annual recognition event. Invite anyone who has set up a planned gift for the church through a bequest, charitable gift annuity, donor advised fund or trust. Report to them on how their gifts are growing and being used. If you are using a portion of your endowment income to fund certain ministries, let donors—and the general membership—know how these gifts are making a difference. Nothing encourages giving like success.

### **In summary:**

1. Constantly look for ways to let the congregation see your endowment program at work.
2. Don't forget to say "thank you."

## **What is your vision?**

The most successful endowment programs—or any giving program for that matter—happen in an environment where clear long-range plans and goals are established, well-communicated and understood. People want to give to ministry. They are attracted to causes and ideas that make a difference in people's lives. Churches that tell stories of mission and ministry through testimony, offering meditations, newsletter articles, videos, email blasts, special events, direct mail and web site content are more likely to excite people about giving.

Look for stories to tell. If you have a donor who is delighted to be leaving a legacy to the church, have the donor tell his or her story. Use the story in a newsletter or church video, or have the donor give a brief talk during worship or at a church event. The Foundation has developed a series of 90-second video spots that tell a story of a particular type of planned gift and what motivated the donor to give. The video spots are available free of charge from the Foundation. To request a DVD, please contact the Foundation toll free at (866) 363-9673. To preview the videos and request copies online, visit the Foundation web site at [www.fumf.org](http://www.fumf.org)

## **What is planned giving?**

Planned giving is all about giving for the long term. Endowment funds are invested to help ensure that the church can continue its mission and ministry beyond our lifetimes. When we make a planned gift, we are giving to something that will continue in perpetuity. Part of the sense of satisfaction that comes from making a planned gift lies in the knowledge that we can make a lasting impact; we can leave a legacy for generations yet to come.

Most church members think of giving in terms of plate offerings. Typically they make a pledge to a stewardship or capital campaign based on anticipated annual income. By contrast, a planned gift typically comes from accumulated assets rather than annual income. A planned gift can be a once-in-a-lifetime gift. In many cases, it may require the assistance of an attorney or other professional financial advisor.

Planned gifts can be as varied as the interests of the donor. They can include such items as stocks and bonds or other appreciated securities, insurance policies, retirement plans, art or antique collections, real estate or other assets. The gifts may be made through such vehicles as trusts, charitable gift annuities, a donor advised fund or a bequest in a will. Often a donor will meet with a financial planner or a representative of the Florida United Methodist Foundation to decide how to fund the gift.

Certain types of planned gifts provide added benefits to donors. For example, some provide tax benefits. Some provide a life income arrangement.

Educating your congregation about planned giving can be daunting. The Foundation's *Planned Giving Guide* and other planned giving publications can be helpful in explaining the benefits of various types of planned gifts. Again, a planned giving or estate planning seminar can be very informative for members who are just learning the language of planned giving. It is a good idea to offer educational workshops on a regular basis.

The Foundation also works with churches to prepare congregations for end of life planning. The Foundation offers an *End of Life Planning Guide* and Foundation staff members are available to lead workshops on how to use it as a resource. Many churches address this topic through a combination of spiritual and practical teachings. For example, the pastor may lead a discussion of spiritual issues, a Foundation staff member may talk about how to organize key information for your survivors and a funeral home director may provide insight into decisions facing families at the death of a loved one. The workshop helps participants become better stewards of their assets and provides them the opportunity to make their wishes known in advance.

## How to communicate

In the world of marketing, most professionals believe that the most effective plans involve “integrated marketing.” That is, you communicate your message through every means possible: through editorial coverage, through advertising, through promotions and special events. When it comes to marketing your planned giving program, your strategy should be similar. Use every means at your disposal.

Talk about planned giving from the pulpit, in church newsletters, at congregational gatherings, in workshops, in brochures, in bulletin inserts, pew cards and other publications. Again, to borrow a principle from the world of marketing, most people don't get the “message” you are trying to convey the first time they hear it. Think about the most successful marketing campaigns you know. You probably remember such corporate slogans as “the real thing” or “you're in good hands” because you have heard them so often and in so many different ways.

Some marketing experts say that consumers have to hear a message at least seven times before they begin to get it. If you are introducing a new idea, communicate it often. People won't automatically remember it; you have to remind them.

## Get your leadership on board

When you first begin your endowment program, make sure to educate your lay leaders. Share the vision with them. Use them to help spread the gospel of planned giving. Meet with your trustees, your finance committee and Ministries Council. Work with other small groups to help build excitement and support for your program. People who understand the vision will help you keep it alive.

## Challenge your donors

Faithful stewards are inspired stewards. If you want to inspire your prospective donors, look to the familiar. The Bible is perhaps the best source of inspiration when it comes to giving. It is filled with references to giving back to God. The story of the widow's mite and the parable of the talents teach us to give sacrificially and to make the most of our resources. In Matthew 6:19-21, Jesus challenges us to forgo the treasures of this world and seek heavenly treasure for “*where your treasure is, there will your heart be also.*”

In his letters to the early Christians, the Apostle Paul encourages us to be generous and cheerful givers. He teaches us to give as we have decided in our heart to give. Moreover, Paul equates giving with “thanksgiving.”

*“You will be made rich in every way so that you can be generous on every occasion, and through us your generosity will result in thanksgiving to God.” 2 Corinthians 9:12*

Likewise, John Wesley, the founder of Methodism, is famous for his teachings on stewardship. His sermons on *The Use of Money* and *The Good Steward* offer excellent insight into the Wesleyan tradition of giving. Wesley admonished his followers to “earn all you can, save all you can and give all you can.” His teachings still resonate with Christians today.

The theology of stewardship is based on the concept that all we have comes from God. Stewardship is about giving back to God in response to His grace in our lives.

## Make it easy to give

The number one reason people do not leave a bequest or other type of planned gift to the church is that they are never asked. Please remind your congregation about leaving a final tithe to the church. Include reminders in the bulletin. Place cards, brochures or envelopes in the pews. Explain how to make a planned gift to the church. Make it easy to give. Someone may be waiting to be asked.

# Resources Available from the Foundation

The Foundation partners with churches to help them set up successful permanent endowment programs. Here are some of the services and marketing resources available from the Foundation:

1. **Planned Giving Handbook** – a step-by-step guidebook on how to establish a permanent endowment program in keeping with the regulations set forth by The Book of Discipline of the United Methodist Church.
2. **Endowment Videos**
  - **Building Church Endowments**
    - a. Why Build an Endowment?
    - b. What can an Endowment Do?
    - c. How to Build an Endowment
    - d. Donor Recognition
  - **Planned Giving Videos**
    - a. Charitable Gift Annuities
    - b. Your Church and Your Will
    - c. Creating a Legacy
    - d. Donor Advised Funds
3. **Planned Giving Guide** – explains the most popular types of planned gifts and how they benefit both the donor and beneficiary.
4. **Brochures** – general information on planned gifts, including wills and annuities
5. **End of Life Planning Guide** – workbook that can be used to provide critical information to family members upon the death of a loved one.
6. **Speakers** – Foundation staff members are available to make presentations to churches on planned giving, estate planning and end of life planning.
7. **Consultation Services** – Foundation staff members will consult confidentially with individuals who wish to leave a gift to a United Methodist Church or charity.
8. **Recognition Program** – The Mustard Seed Society provides certificates, pins and other donor recognition materials to local churches.
9. **[www.fumf.org](http://www.fumf.org)** – Foundation web site offers general information on planned giving and a gift calculator which can show donors potential tax savings and income benefits that derive from certain types of planned gifts, such as charitable trusts and gift annuities.

# Promotional Models

**T**he Foundation's *Planned Giving Handbook* contains in-depth information on how to promote a permanent endowment program. The following information – excerpted from that handbook – outlines two possible models for use in local churches. The first model is the most comprehensive. It begins with a modified promotional emphasis and adds more each year. Model two is a beginning model that can be upgraded as needed. Regardless of the chosen model, always remain sensitive to “overselling” the concept of making a planned gift. If members begin to feel that they are being overwhelmed with a “demand” for a gift, the program will suffer. The model you choose should be tailored to reflect the needs of your congregation.

## MODEL ONE

A Three-Year Plan for Promoting  
Your Church's Permanent Endowment Emphasis

### Year One

Two educational presentations to Administrative Board

Mailings -

February	Permanent Endowment Fund promotional brochure
May	Wills series brochure
August	General Planned Giving brochure

- Quarterly articles in church newsletter
- One-liners in bulletin once each month (See *Planned Giving Handbook*)
- Wills Clinics or Gifts and Wills Workshop
- Memorial Observance and Service of Remembrance

### Year Two

Quarterly educational presentation to Administrative Board

Mailings-

February	Wills series brochure
May	Estate planning brochure
August	Wills series brochure
November	Life insurance brochure

- Monthly articles in church newsletter
- One-liners in bulletin twice each month (See *Planned Giving Handbook*)
- Wills Clinic or Gifts and Wills Workshop
- Memorial Observance and Service of Remembrance

## Year Three

Two educational presentations to Administrative Board

Mailings-

January	Wills series brochure
March	Living trust brochure
May	Wills series brochure
August	Permanent Endowment brochure
November	Year end giving brochure

- Monthly articles in church newsletter
- One-liners in bulletin each week (See *Planned Giving Handbook*)
- Wills Clinic or Gifts and Wills Workshop
- One Estate Planning Seminar
- Target Group Presentations (i.e. UMW, UMM, Senior Adults)
- Memorial Observance and Service of Remembrance

# MODEL TWO

## A Two-Year Program of Promoting Permanent Endowment

### Year One

February: Make a presentation at an Administrative Board/Council meeting to church leaders on giving through endowments, memorials and other Permanent Endowment vehicles. Distribute a flyer on giving opportunities. Conduct a written survey.

1. Who has a will?
2. Who has included the church in their will?
3. Who will consider adding the church to their will?
4. Who would like to talk privately about giving options?

May: Send a mailing to the entire congregation about giving options through the church's endowment and memorial program.

November: Send a mailing about the advantages of giving at year-end.

Use one-liners for bulletin and newsletters when appropriate throughout the year.  
(See *Planned Giving Handbook*)

Make announcements at group gatherings in the church (including worship) about giving through the church's endowment and memorial program.

### Year Two

January: Write an article for the newsletter about the necessity of having a will.

February: Send letter and brochure announcing a Wills Workshop.

March: Conduct a Wills Clinic or Gifts and Wills Workshop.

April- September: Write a short statement or article monthly in the church newsletter about the church's endowment and memorial program.

October: Send a letter and brochure about giving through wills.

November: Conduct an All Saints' Day remembrance and recognition service.

# Sample Agenda

## Estate and Gift Planning Workshop

### I. Welcome

- Devotional
- Statement of purpose for the workshop

### II. What is an estate?

- How will my property be distributed?
- What about taxes?

### III. My Will

- What is a will?
- Who needs a will?
- What can a will do? Not do?
- What does it cost?
- Will I need an attorney?
- How do I choose my executor or executrix?
- Who should witness my will?
- Where should I keep my will?
- How often should it be reviewed?
- How can I remember the church in my will?

### IV. Creative Gift Planning

- Cash
- Bequests
- Securities
- Real Estate
- Tangible personal property
- Gifts through life insurance
- Life income gifts
- Gifts through retirement plans
- Gifts through business
- Transfer- on-death accounts

### V. Planned Giving and Endowment Funding in the Local Church

- Why “planned giving” in the local church?
- Endowments and other opportunities in our church

### VI. Other Documents

- Durable Power of Attorney for health care
- Durable Power of Attorney for financial affairs
- Living will

# Sample Bequest Language

**L**eaving a bequest to your church or favorite United Methodist charity is one of the easiest ways to leave your legacy. You simply write the bequest into your will. As you consult with your attorney on the exact wording to reflect your goals and intentions, be sure to use the correct legal (corporate) name of your church or charity in all final documents.

Example: “*Wesley United Methodist Church, a nonprofit corporation, or its successor.*”

In your will, you have choices as to how to create your bequest. You may choose to leave a fixed dollar amount, or a percentage of your estate, or the residuary estate or a portion thereof. The following is a listing of examples of the most popular types of bequests:

**A General Bequest** of a stated sum of money may be worded: “I give to \_\_\_\_\_, a Florida nonprofit corporation, or its successor (insert the exact dollar amount).”

**A Specific Bequest** of a certain asset from your estate may be worded: “I give to \_\_\_\_\_, a Florida nonprofit corporation, or its successor (insert a description of the particular property).”

**A Residuary Bequest**, after other bequests and expenses have been paid, may be worded: “I give to \_\_\_\_\_, a Florida nonprofit corporation, or its successor all (or a percentage) of the rest, residue and remainder of my estate.”

**An Endowed Bequest** allows you to restrict the principal of your gift, requiring The Foundation to hold the funds permanently and use only the investment income generated to support beneficiaries indefinitely. “I give to The Florida United Methodist Foundation, Inc., or its successor all (or a percentage) of the rest, residue and remainder of my estate as a permanent endowment gift to benefit (insert legal name of beneficiary here).”

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# Planned Giving Guide

Giving to the United Methodist Church can take many forms. The Foundation encourages donors to explore ways that are best for them. Options available through planned giving offer creative alternatives that often benefit both donor and recipient. Here are some charitable gift ideas that are simple to execute, and can be used to benefit your church or any Florida Conference church-related charity. Before making a final decision, please consult with your professional financial advisor or contact the Florida United Methodist Foundation toll-free at (866) 363-9673.

GIFTS YOU CAN MAKE NOW			
Your Goal	Type of Gift	How To Give	Benefits
Make a quick and simple gift.	Appreciated Securities	Transfer stock or mutual funds to your church. If your church does not have a brokerage account, donations may be made through the Foundation.	Donor avoids capital gains taxes and receives an income tax deduction; church sells shares tax-free.
Avoid capital gains tax on the sale of a home or other real estate.	Appreciated Real Estate	Donate property to your church.	Immediate income tax deduction and avoidance of capital gains tax.
Make a gift that allows flexibility and your input on how funds will be distributed.	Donor Advised Fund	Create an agreement whereby Foundation manages your assets; you and/or family members advise the Foundation regarding charitable disbursements.	Immediate income tax deduction, flexibility and an opportunity to practice philanthropy on a regular basis.
Make a significant gift with little cost to yourself.	Life Insurance	Designate your church as a beneficiary.	Future gift to church.
Give your personal residence or farm, but continue to live there.	Retained Life Estate	Designate the ownership of your home to your church but retain occupancy.	Charitable income tax deduction and lifetime use of your home.
Avoid taxation on retirement plan assets.	Retirement Plan	Name your church as beneficiary of the remainder of the assets after your lifetime.	Avoidance of heavily taxed gift to heirs.

GIFTS YOU CAN DEFER			
Your Goal	Type of Gift	How To Give	Benefits
Defer a gift until after your lifetime.	Bequest in Will	Leave your legacy and remind loved ones of your faith by tithing part of your estate to the church. A bequest can be a specific amount or asset, or a percentage of your estate. A residual bequest assigns the amount left in the estate after all other distributions have been made.	Your estate receives a tax deduction. The church receives your gift when the estate is settled.
Make a deferred gift, maintain access to assets, avoid probate.	Living Trust	Donor places assets into a trust; retains control during lifetime. Foundation becomes trustee upon death of the donor, and makes distributions as directed by donor.	Privacy, flexibility, control of trust for lifetime, possible estate tax savings.

LIFE INCOME ARRANGEMENTS			
Your Goal	Type of Gift	How To Give	Benefits
Supplement income with fixed annual payments.	Charitable Gift Annuity	Enter into a contract with the Foundation. Foundation pays you fixed payments for life and distributes remainder to church and other charitable beneficiaries.	Charitable income tax deductions, fixed annuity payments for life (portion tax-free) future gift to church.
Supplement income with fixed annual payments.	Charitable Remainder Annuity Trust	Create a charitable trust that pays you a fixed income.	Charitable income tax deduction, fixed income for life, future gift to church.
Create a hedge against inflation over the long term.	Charitable Remainder Unitrust	Create a trust that pays you a percentage of the trust's assets, valued annually.	Immediate income tax deduction, annual income for life that has potential to increase.
Reduce gift and estate taxes on assets passing on to heirs.	Charitable Lead Trust	Create a trust that pays a fixed or variable income to your church or ministry for a set period of time, then passes to heirs.	Reduces size of taxable estate; keeps property in family, often with reduced gift taxes.

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**The Florida United Methodist Foundation, Inc. facilitates giving to churches, agencies and institutions of the Florida Annual Conference of the United Methodist Church. To learn more about our services, please visit our web site at [www.fumf.org](http://www.fumf.org) or call us toll free at (866) 363-9673.**

# Sample Tri-fold Brochure

## So Many Ways to Give

For Reference Only

May be adapted to meet the needs of individual churches

### *Cover Panel*

*(You may want to use photos of your church or photos of members and families. You may want to include inspirational quotes from members or philanthropists and Biblical passages that inspire giving.)*

## It's easy to give to *(Church Name)*

Did you know that you can give to *(church name)* in a variety of ways; not just through Sunday morning plate offerings, but in creative ways that allow you to use your assets in addition to income? Thanks to our Permanent Endowment Fund, *(church name)* members can make charitable contributions to the church in just the same way they might donate to any other charity.

### *Inside Panel*

Your gift may be made in many different ways:

#### **Outright gifts**

- Cash
- Publicly Traded Securities
- Real Property
- Tangible Personal Property
- Other Property

#### **Planned Gifts**

- Bequests
- Life Estates
- Life Insurance Policies
- Life Income Programs
- Retirement Plan Gifts

## Leaving Your Legacy

A planned gift to the endowment fund will help ensure that the ministries that have meant the most to you in your lifetime will continue into the future. You do not have to be wealthy to give. You may make gifts in memory or in honor of friends and family. With planned giving, you decide what to give and how to give it. Many planned gifts offer certain advantages to both the donor and the church. You may designate your gift to benefit a certain ministry area. A list of our designated funds include: general endowment (list sub funds approved by Permanent Endowment Committee).

## *Inside Panel*

### Popular Ways to Give

**Appreciated securities** — Transfers of stocks or mutual funds may be made directly from your brokerage account to (church name). To inquire about how to transfer securities, please contact (church office/business administrator) at (phone number).

**Beneficiary designations** — Donors may make a significant deferred gift to the church by designating (church name) as a beneficiary of a life insurance policy or retirement plan. There are many ways to give through life insurance and retirement plans, some of which may have benefits to donors. Please consult your financial advisor.

**Bequest in your will** — Give a fixed amount or item (or property) to the church. Some donors prefer to designate a percentage of their estate or donate the residual amount left in the estate after all other bequests are granted.

**Personal property** — Personal property such as automobiles, works of art, antiques, coin or stamp collections, jewelry and other items also may be given to the church.

**Life income plans** — Life income plans such as charitable gift annuities and charitable remainder trusts may be set up through the Florida United Methodist Foundation to benefit (church name). Donors receive a charitable deduction when the gift is made and income throughout their lifetimes. The remainder goes to the church upon the death of the donor.

*List other types of gifts as appropriate*

## *Back Panel*

### *Disclaimer and contact information*

*The purpose of this publication is to provide general gift giving information. Neither the author nor this organization is engaged in rendering legal or tax advisory service. State laws govern wills, trusts and charitable gifts made in a contractual agreement. For advice and assistance in specific cases, the services of an attorney or other professional advisor should be obtained.*

*(Name and address of church, phone number, web address and email address.)*



**I**n one of his most familiar parables, Jesus compares the kingdom of God to a mustard seed, “which, when sown upon the ground is the smallest of all the seeds of the earth; yet when it is sown it grows up and becomes the greatest of all shrubs, and puts forth large branches, so that the birds of the air can make nests in its shade.”

We have an opportunity to be sowers of a different kind of seed, the fruit of which will enable congregations of the Florida Annual Conference to be in ministry for many years to come. In that spirit, the Florida United Methodist Foundation provides **The Mustard Seed Society**, a thank-you and recognition program for use by local churches to say “thanks” to members who have made planned gifts to benefit the church.

Just as the tiny mustard seed grows into a large plant, planned gifts such as bequests, life income arrangements, gifts of real property and gifts of other appreciated assets can grow into substantial endowment funds that will nourish and sustain local church ministries far into the future. We are living in a time of unprecedented wealth transfer from older to younger generations, and the Foundation likewise encourages churches to encourage their members to be active stewards of the resources God has bestowed on them – during their lifetimes and after – to benefit the church, its mission and ministry.

The Foundation provides a lapel pin and personalized certificate signed by the Bishop, the President of the Foundation and the recipient’s Pastor as a public way of saying thank you to the donor of any planned gift.

We recommend an annual recognition and celebration event to honor all members of a congregation who have made planned gifts to the church, and especially to recognize those who have done so in the previous year.

Foundation staff members are very happy to participate in the recognition service or other celebration event to add our thanks. Our staff members are always available for no-cost consultation to individuals on estate planning, planned giving, and ways individuals can remember their church in their estate plans. Our staff is also available to aid churches in the establishment of a permanent endowment fund to provide financial strength and stability for future generations. For more information, please call the Foundation toll free at (866) 363-9673.



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