

Florida United Methodist Foundation, Inc. • Third Quarter 2008

“It’s Not Your Parents’ Offering Plate” Is Theme for 2008 Stewardship Summit

Looking for new ways to invigorate your stewardship programs?

Get ready for the Foundation’s second annual Stewardship Summit set for Saturday, Sept. 13 from 8 a.m. to 2 p.m. at First United Methodist Church of Lakeland. Nationally known stewardship consultant, Dr. Clif Christopher, a clergy member of the Arkansas Annual Conference and founder of Horizons Stewardship, will deliver a keynote address titled *“It’s Not Your Parents’ Offering Plate.”*

Christopher will address challenges facing churches and other faith-based non-profits as they struggle to be competitive in an environment where more than 1.8 million (501) (c) (3) organizations are scrambling for a shrinking supply of charitable giving dollars. According to Christopher, churches cannot conduct business as usual and hope to succeed.

Summit attendees also will have an opportunity to participate in two breakout sessions during the day. Topics include: connectional giving, planned giving,

capital fund raising and discussions on how to use new and emerging technologies in your giving program. Two separate workshops will focus on how to nurture a congregation of generous givers and how to incorporate stewardship into the worship experience. All attendees are invited to participate in a general question and answer and sharing session with workshop leaders immediately following lunch.



Clif Christopher

The Stewardship Summit is open to lay and clergy from any church, mission, institution or agency of the Florida Annual Conference. Cost for the one-day event is \$50 and includes continental breakfast, lunch and materials. The Foundation has secured special rates for attendees with four Lakeland area hotels. Complete details

are available on the Foundation web site at www.fumf.org. Please click on the **Register for Stewardship Summit** link on the “welcome” page. The Foundation encourages pastors, lay leaders, trustees, business administrators, finance and stewardship chairpersons and any church members involved in stewardship or discipleship education to attend.

Foundation Welcomes New Board Members

Mark Becker, senior pastor of Orange Park United Methodist Church, Julia Cartland, a certified public accountant and member of Englewood United Methodist Church, and Florida Conference Treasurer Milton E. (“Mickey”) Wilson have joined the Foundation’s Board of Directors, effective June 2008.



Mark Becker

he worked as a nuclear engineer for General Electric Company and a Senior Financial Analyst for IBM.

Becker has served three churches in the Florida Annual Conference. He was pastor at Archer UMC and Associate Pastor at Trinity UMC in Gainesville prior to his appointment to Orange Park. He is a member of the Conference Board of Ordained Ministry and serves as Chair of the North East District Committee on Ordained Ministry. He and his wife, Marie, have two children.



Julia Cartland

Becker was graduated from the United States Naval Academy in 1977, and served as a submarine officer from 1977-1982. He earned an MBA degree from Cornell’s S. C. Johnson Graduate School of Management and a Master of Divinity from Duke University. Prior to entering the ministry,

Cartland is a partner in the accounting firm of Mercier and Cartland, PA of Englewood. She received her undergraduate degrees in finance and accounting from Florida State University, and subsequently joined Bank of America where she worked as a

member of the bank’s audit department and later transferred to the Private Bank Division where she administered trusts, guardianships and estates. During her banking career, Cartland worked in Atlanta, Tampa and St. Petersburg.

After completing her Certified Public Accountant certification, she joined her mother’s accounting firm in Englewood, where she has been active in both church and community service. She is a member of the American and Florida Institute of Certified Public Accountants and the Venice Estate Planning Council. She is a board member of the Englewood Community Hospital, South County YMCA and Englewood Interagency Council. She is an active member of the Endowment and Education Committees of her church. She and her husband, Brian, have four children.

As Conference Treasurer, Wilson serves in an ex officio capacity along with Rev. Mont Duncan, Executive Director of the Committee for New Church Development and Bishop Timothy Whitaker. Before joining the Florida Annual Conference, Wilson served as Chief Financial Officer (CFO) for the General Council on Finance and Administration (GCFA) of the United Methodist Church and served concurrently as CFO of the United Methodist Property and Casualty Trust (UMPACT) and the United Methodist Foundation.



Mickey Wilson

Keystone UMC Opens New Educational Wing

It's been a pretty exciting summer at Keystone United Methodist Church in Odessa. The church opened its new educational wing just in time for summer programs. The new 60' x 112' building is tailor made for the younger set with brightly colored rooms and carpets, pint-sized furnishings and restrooms. In planning the facility, the building committee connected it to the church's existing fellowship hall and created a new drive-through and drop-off area that can be shared by both buildings.

The new building, financed by a \$1.25 million loan from The Development Fund, contains six classrooms, an office, restroom facilities for children and adults, a break room, sick room, storage, utility and

maintenance closets. A fenced-in children's playground is located at the rear of the building.



The new facilities can be utilized as a weekday childcare facility, if the church decides to add one in the future. And, with a little rearranging, the flexible space can be used for adult meetings and activities as well.

Foundation Awards Emergency Grant To Crystal Lake UMC in Lakeland

At its June Board meeting the Directors of the Foundation approved a \$5,000 emergency grant for Crystal Lake United Methodist Church in Lakeland to help it recover financially from a plumbing leak that caused widespread flooding and water damage to the church parsonage. The grant will be "matched" by The Florida Annual Conference ministry protection program. The monies will be used to help meet the church's insurance deductible and to cover additional expenses incurred during the clean-up and replacement period. The church already has been struggling to meet its insurance deductible for a separate incident

involving the theft of a three-and-a-half-ton air conditioning unit from its educational building.

According to Foundation President Tom Marston, the emergency grant ministry is designed to help churches overcome financial challenges and hardships that go beyond the scope of its general operating budget, and which may impede the church's ability to deliver ministry to its local community. The Foundation reviews applications throughout the year. For more information, visit www.fumf.org.

Meet Bonnie Ogie-Kristianson New Fund Raising Director



Rev. Bonnie Ogie-Kristianson is the new Fund Raising Director for the Foundation. She will be working closely with the Bishop's Capital Campaign Commission on major gifts to the Together! Campaign of the Florida Annual Conference and also will be available as a fund raising consultant to local churches. Additionally, Ogie-Kristianson is one of several staff members available to work with churches on such areas of financial ministry as stewardship, planned giving and end-of-life planning.

A clergy member of the Northern Illinois Annual Conference, Ogie-Kristianson moved to New Smyrna Beach in July 2004, and was on staff at Coronado Community UMC prior to joining the Foundation. During her tenure in the Northern Illinois Conference she served local churches and later became a member of the conference program staff. She ultimately became Conference Council Director. She also has served as a stewardship consultant for LeWay Stewardship Resources.

Ogie-Kristianson is a native of Columbus, Ga. and a graduate of the Candler School of Theology at Emory University. She and her husband, Tom, have two children, Lucile, 21 and Ed, 18.

It's Easy to Leave Your Legacy

Would you like to leave a legacy to your church or favorite ministry? Would you like to honor a United Methodist institution, agency or charity? One of the simplest ways is to leave a bequest in your will or living trust.

It is very easy to do so. You do not have to be wealthy. And, you control the distribution of your assets.

When you make a will, you can provide for your family *and* for the institutions that have meant the most to you during your lifetime. Through a bequest, you can leave a material legacy and pass along the values and spiritual practices you hold most dear.

Bequests are one of the least expensive gifts you can give. You can give a specific amount or asset such as

securities, life insurance, an annuity or retirement account. You can give a percentage of your estate, or you can make a residual bequest so that assets remaining after all other distributions have been made will go to charity.

Keep in mind that a bequest is revocable. You have access to your funds throughout your lifetime. Upon your death and once the bequest is made, your estate will receive a charitable deduction.

If you are thinking of making a bequest, be sure to get the legal name of the church or charity, and be sure to let them know that you are planning a gift. For more information, contact The Florida United Methodist Foundation toll-free at (866) 363-9673.

Foundation Office Staff Grows Along with Growth in Assets

With more than \$227 million in assets under management – a net growth of more than \$30 million in 2007 – the Foundation staff has expanded to help keep up with the increased accounting and reporting responsibilities. Our newest staff members are Accounting Specialists Darlene Kepner and Sylvia Menchaca and Administrative Assistant Julia Morrison.

Kepner, who has worked in accounting since the 1980's, has assumed a number of general accounting

duties, including working with cash deposits, invoices and participation account withdrawals. Menchaca catalogs and prepares the Foundation's daily deposits and records gifts and pledges to the Together! capital campaign for the Florida Annual Conference. Julia Morrison performs reception, general office and accounting duties. She is a permanent part-time employee who keeps a Monday through Thursday schedule.



Darlene Kepner



Sylvia Menchaca



Julia Morrison

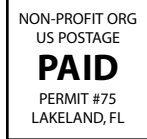
Foundation's New Handbook Provides Tips and Resources For Marketing Endowment Programs

If your church has an endowment program but would like to know more about how to promote it, the Foundation's new *Marketing Your Endowment Program* handbook can help. The handbook offers ideas and resources to help local churches tell the story of planned giving as part of their overall comprehensive Christian stewardship training. The handbook offers general marketing guidelines, a sample agenda for an estate planning

workshop, an information sheet on the types of planned gifts that donors may wish to consider, information on *The Mustard Seed Society* donor recognition program and more. To request a printed copy, call the Foundation at (866) 363-9673 or email us at foundation@fumf.org; to view an electronic copy, visit the "resources and downloads" section of the Foundation web site, www.fumf.org.



The Florida United Methodist
Foundation, Inc.
Post Office Box 3549
Lakeland, FL 33802-3549



RETURN SERVICE REQUESTED

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Development Fund Rates Third Quarter 2008

3.5% Savings Rate

5.5% Loan Rate

The interest rate payable on your Participation Account will vary from time to time, as determined quarterly by the Board of Directors of the Foundation. Current interest and loan rates are posted on the Foundation web site, www.fumf.org, and also may be obtained by calling us toll free at (866) 363-9673 or by emailing us at foundation@fumf.org.

What's Online?

Want to know more about the Foundation? Check in with us at www.fumf.org.

When you visit our website, you can check the current Development Fund loan and investment rates, find out how well our common funds performed during the most recent quarter and explore planned giving options using our online gift calculator.

You also will find resources on stewardship and connectional giving. And, you can check out upcoming events, or send us an email. To learn more, visit us at www.fumf.org.

Foundation Office Hours

The Foundation office is located on the fifth floor, Suite 510, of the CenterState Bank Building in Lakeland. Office hours are 8:30 a.m. to 4:30 p.m., Monday through Friday, except for official holidays recognized by the Florida Annual Conference. If you are planning to make a deposit or withdrawal from your Foundation account, please allow at least two business days from the date of receipt for processing. If you have any questions about Foundation policies and procedures, please call us toll free at (866) 363-9673.