NEBRASKA UNITED METHODIST FOUNDATION
100 W. FLETCHER AVE., STE. 100
LINCOLN, NE 68521

PLACE
STAMP
HERE

OTHER SERVICES AVAILABLE TO CHURCHES & AGENCIES

- Gift and estate planning presentations to groups
- Confidential gift planning consultations with individuals
- Assistance in the development of endowment funds
- Stewardship sermons, services and training
- Preliminary capital campaign planning
- Administration of grant and scholarship funds on behalf of donors
- Awarding of grants to churches and ministries
- Awarding of scholarships to seminary students

Each member of the Nebraska Annual Conference is a member of the Foundation. It is the pleasure of the Board and staff to serve on your behalf.

INVESTMENT & FUND ADMINISTRATION SERVICES

For Churches and Other United Methodist Ministries

Provided By The

UM FOUNDATION

Nebraska United Methodist Foundation

100 W. Fletcher Ave., Ste. 100
Lincoln, NE 68521
(p) 402-323-8844 or 877-495-5545
(f) 402-323-8840
info@numf.org
www.numf.org

FOUNDATION PORTFOLIOS AVAILABLE FOR CHURCH FUNDS

FIXED INCOME FUND

- 100% fixed income securities
- Time horizon - a few months up to 2 years
- Lowest risk; least opportunity for growth*

CONSERVATIVE FUND

- 75% fixed income securities; 25% equities
- Time horizon - a few months up to 5 years
- Low risk; some opportunity for growth*

BALANCED FUND

- 50% fixed income securities; 50% equities
- Time horizon - 3 to 8 years
- Some risk; good opportunity for growth*

LONG-TERM GROWTH FUND

- 25% fixed income securities; 75% equities
- Time horizon - 5 years or longer
- Some risk; excellent opportunity for growth*

EQUITIES FUND

- 100% equities
- Time horizon - 5 years or longer
- Highest risk of the 5 Funds; greatest opportunity for growth

**Based on historical performance. Past performance cannot guarantee future results.*

PROGRAM ADVANTAGES

- Low minimum deposit of $1,000 for new accounts.
- Small accounts have same level of diversification and growth potential as large accounts.
- Availability of innumerable, separately administered accounts.
- Accounts may be invested in a single portfolio or any combination of available portfolios.
- Separate quarterly reports for each account (monthly reports online).
- Deposits and withdrawals allowed at any time.
- No commissions, sales charges, front or back-end loads, surrender charges, or penalties for early withdrawal.
- All funds on deposit remain the property of the account holder.
- Immediate access to funds.
- Low fund management and account administration fees.

FOR MORE INFORMATION OR TO SCHEDULE AN APPOINTMENT, CALL, E-MAIL OR RETURN THIS CARD.

☐ We'd like to learn more about the Foundation's Investment and Fund Administration Services for churches and ministries. Please contact us.

☐ Please send a packet of investment information for our review.

☐ We are interested in receiving more information about:

☐ Creating an endowment fund

☐ Programs about gifts that pay income to donors and then support the church's mission after the donors' lifetimes

☐ Remembering the church or other ministry in our estate plan

Name ____________ Title ____________

Church or Ministry ____________

Mailing Address ____________

City ____________ State ____________ Zip Code ____________

Phone ( ) ____________ Best Time to Call ____________ E-mail ____________