



40 Years

1965 – 2005

Nebraska United Methodist Foundation
2005 Annual Report

Celebrating its 40th year in 2005, the Foundation attained several significant milestones. Among them was the move to a new location.

While the location and the property itself have generated value for the Foundation and the Conference, the most significant aspects of the acquisition revolve around the Foundation's mission of serving Nebraska United Methodism.

On paper, the Foundation's assets and distributions to Conference and individual church ministries reached record levels in 2005.

In terms of touching lives, and being touched by those whom we have come to know, the levels of both need and generosity know no bounds.

The purchase of the new office building was made possible through the generosity of donors in both the east and west ends of our Conference. Their foresight as to the role the Foundation will play in the future comes as the result of many decades of growing up in and having their spiritual lives enriched by the United Methodist Church. They have been a big part of the Church's past, and they recognize that the Church's future depends greatly upon the vision, the decisions, and the actions that take place in the present.

The Foundation's work on behalf of our Conference will never end. We appreciate the opportunity we've been given to serve you, and we thank you for all you do to help others in the name of Christ.



A Lifetime of Love and Giving



Paul & Eleanor
McIntosh

At a Christmas party in a rural Stanton County school in December 1940, J. Paul McIntosh met a brown-eyed, brunette, Czech girl who was destined to change his life forever. They were married on October 25, 1945, while he was on a three-day Army pass, and as J. Paul says of Eleanor, "She's been the Light of my life ever since." It's a true pleasure to see so much love and appreciation between two people who've been life partners for over 60 years, with five children (three daughters and two sons), five grandchildren, and three great-grandchildren.

It's also a pleasure and an inspiration to see such spiritual commitment and generosity on behalf of this couple. Eleanor says, "Our strength and values come from our parents, teachers, the church, and through raising our family and helping others who are less fortunate." According to Paul, "The most important decision I made was accepting the Fatherhood of God and the example of Christ for my life when I was in the seventh grade." From that time on, Paul has tried to live his life as God would have him do.

Recognizing that giving is a matter of proportionality, Paul says the first financial commitment that really made them "stop and think" was shortly after World War II. "We had nothing, but we made a pledge to the Lincoln Air Base Community Church. We could no more afford it than anything, but we made the commitment, and never missed a payment."

Their next "major" gift was shortly after returning to Norfolk, when they pledged \$900 per year from a \$3,000 annual income to help pay for the new church. They've been members of the First United

Methodist Church of Norfolk since November 5, 1955.

Since 1997, J. Paul and Eleanor have made four gifts to the Foundation, which in total, constitute the largest gift received in the Foundation's 40-year history. The McIntoshes' gifts are currently providing 30-50 grants annually to a wide array of institutions and organizations of their choosing. As endowed gifts, their financial support will continue on for generations to come following their lifetimes.

Paul says, "So often after making a major gift, I've thought, 'this will be the last one I'll be able to do,' but then I find another purpose that touches my heart, and lo and behold, something happens to make the money available for the next new project!"

When asked what one bit of advice he and Eleanor would give others, Paul says, "If you will recognize the spiritual part of your life and follow the teachings of Christ, everything else seems to fall into place. Thinking about it, everything in my life has flowed from that decision I made in seventh grade to let Christ guide my life."

And, he says, "The Nebraska United Methodist Foundation has been extremely helpful as we made financial decisions that have leveraged the effectiveness of our gifts. We appreciate the staff keeping us up-to-date on the status of the various donations we have made."

The Foundation certainly appreciates everything J. Paul and Eleanor McIntosh have done for our Conference, their church, and causes throughout Nebraska. They're inspirations to us all, and we're pleased to be their partner in ministry.



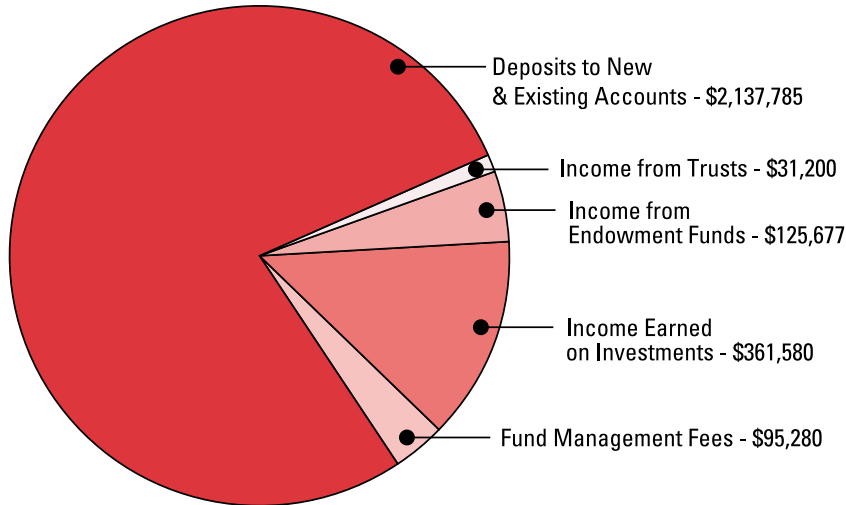
"As a student pastor serving a part-time appointment, receiving scholarships has kept me from having to seek additional part-time employment. I appreciate very much that scholarships are available to seminary students."

- Rev. Patricia Norris,
pastor at the Palmyra and Cheney United Methodist Churches,
student at Saint Paul School of Theology in Kansas City, MO,
and the 2005 recipient of the Sylvia Miller Memorial Scholarship.

2005 Financial Information

Income Received

During Year 2005 - \$2,751,522

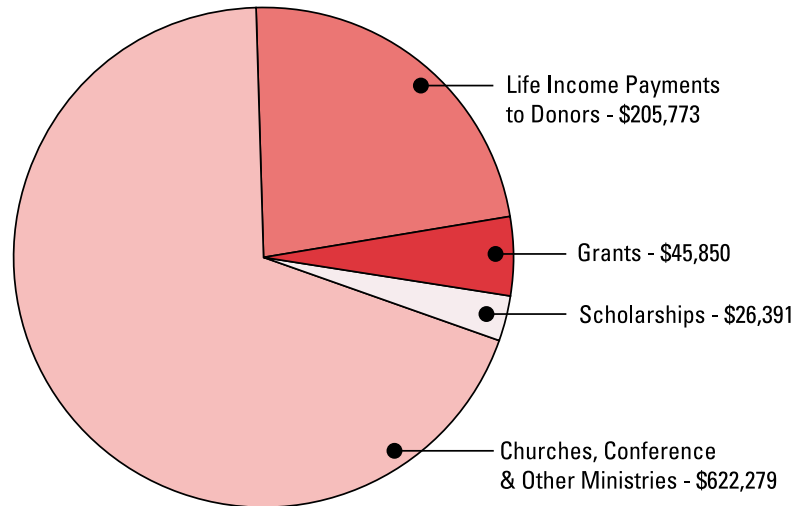


"The grant received from the UM Foundation enabled Released and Restored to provide each of the inmates enrolled in our Planning With Purpose classes at the Nebraska State Penitentiary with a copy of the book 'The Purpose Driven Life.' These books serve as a tangible reminder to each recipient that they do indeed have worth and purpose. Thank you very much for being a part of our mission."

- Ruth Karlsson,
Executive Director, Released and Restored ministry, in response to a Foundation grant for the purpose of helping finance their re-entry program for Nebraska State Penitentiary inmates

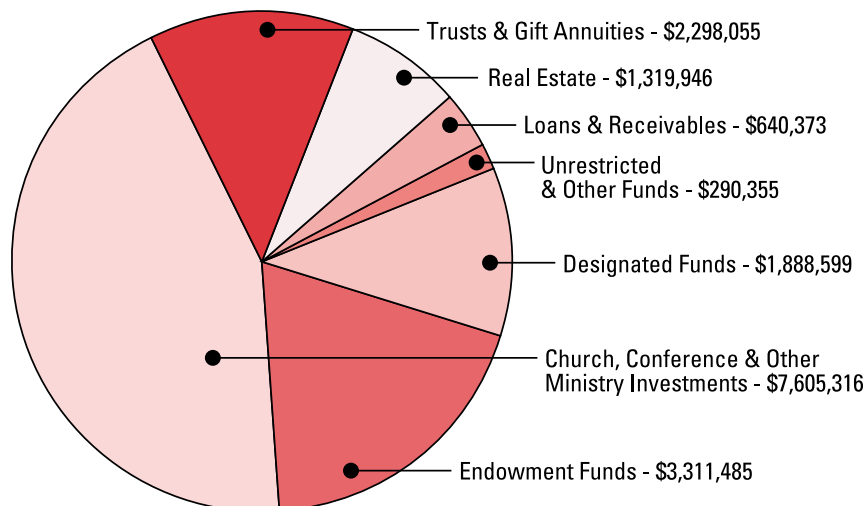
Funds Distributed

During Year 2005 - \$900,293



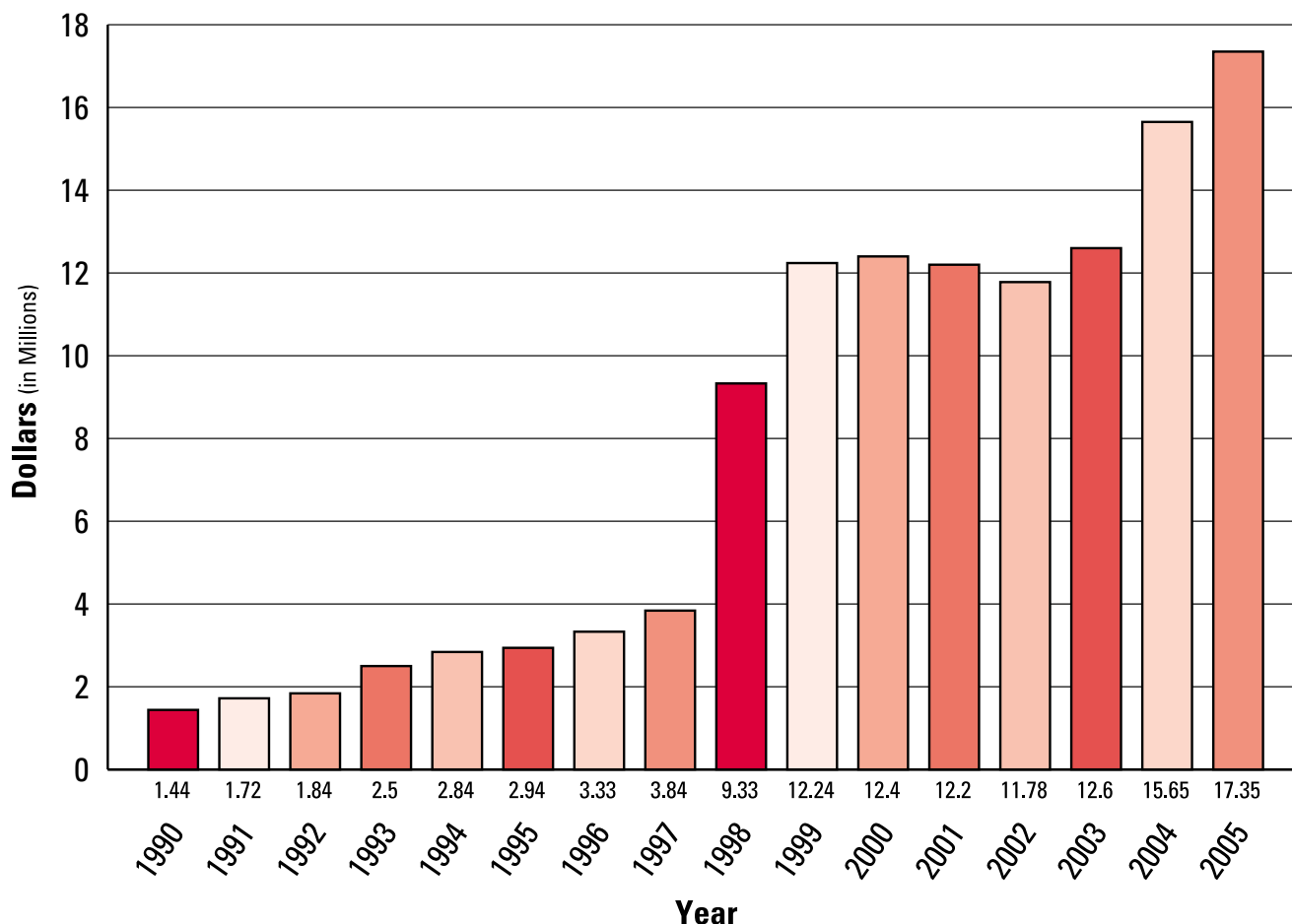
Assets Held by the Foundation

on 12/31/05 - \$17,354,129



*Figures compiled prior to year 2005 audit.

Growth of Assets



2005 In Review

- **Funds distributed** to churches, ministries, seminary students, and as grants grew from \$570,977 in 2004 to \$694,520 – a **22%** increase.
- **Investment results** for the three socially responsible Funds available to churches and ministries provided an average 3.91% rate of return, with the Long-Term Growth Fund, designed especially for endowments, earning 4.73%. (Each Fund exceeded the benchmarks.)
- **Depositor-owned investments** grew by **27%** to \$7,605,316.
- **Operating expenses** averaged **\$3.17** per Conference member, while asset growth and distributions for ministries and programs totaled **\$28.65** per member.
- **Total assets** under ownership and management increased by **10.3%** during the year to \$17,354,129, or **\$201.18** per Conference Member. In 1995, assets per Conference member were \$23.55.
- For the ninth consecutive year, the Foundation operated free of Conference financial support, **and** expenses were less than budgeted.

"I will never forget the Sunday I was sitting in a neighboring church because our church had been destroyed by a tornado. It was so heartwarming when we learned that Alice Kruse had made a gift through the Foundation for our Church Rebuilding Fund. The Foundation is doing a great job finding kind people who want to share their gifts with those who will use them to their best ability to share the love of Christ."

- Kathy Stevens,
member of the Hallam United
Methodist Church, in response
to a grant bequest

Gifts & Tributes

The following current and planned gifts, tributes, honors, and memorials were given to the Foundation in 2005. Please notify us of corrections or omissions.

Charitable Gift Annuities

Becky Beel, *Johnstown*
Mildred Hoatson, *Hershey*
Mary Moore, *Tekamah* (3)
Dorothy Rood, *Wahoo*

Alva Clark Development Fund

Rev. Dr. Alva H. Clark, *Omaha*

Conference Congregational Development Fund

Twyla Lydolph, *Lincoln*

Cowles United Methodist Church Memorial Scholarship Fund

Dean & Isla Armstrong, *Red Cloud*

Dan Flanagan Endowment Fund

Rev. Dr. Dan Flanagan, *Papillion* (4)

Fleming-Humphrey Scholarship Fund

Randy Fleming, *Springfield*

Dean & Jean Fleming Lay Speaking Scholarship Fund

Jean Fleming, *Atkinson*
Randy Fleming, *Springfield* (2)

Dean, Jean & Randy Fleming 100 Club Scholarship Fund

Randy Fleming, *Springfield* (2)

Randy Fleming UM Men's Endowment Fund

Randy Fleming, *Springfield*

Randy Fleming UM Men's Executive Director Fund

Randy Fleming, *Springfield*

Foundation Staff Development Fund

Dwight & Bette Trumble, *Springfield*

Foundation Unrestricted Fund

Anonymous Operating Fund
Alva Clark Development Fund
Extension Operating Fund
Helen, Ella & Flory Trust
John Kruse Development Fund
Owens Operating Fund
Fred & Rixie Roberts Fund
MP & JA Scahill Fund
TJ & JM Scahill Fund
Marguerite Willis Fund

Hurricane Katrina Relief Fund

Lula Elwood, *Gordon*
Baldwin F. & Amy L. Kruse Trust

"Gifts From the Heart" Endowment Fund

Kim & Tom Dinsdale, *Grand Island*
Jim & Elda Heller, *Lincoln* (2)
Ed & Cora Loutzenheiser, Jr., *Hastings* (2)
Dwight & Bette Trumble, *Springfield*

Roland & Ruby Johnson Endowment Fund

Ruby Johnson, *Neligh* (3)

Alice Kruse Congregational Development Fund

Alice Kruse, *Blair*

Alice Kruse Ministerial Scholarship Fund

Alice Kruse, *Blair*

Loy-Norris Endowment Fund

Stephen & Sue Shull, *Ogallala*

Albert R. Murdoch Ministerial Scholarship Fund

Dr. Arthur Murdoch, *Atwater, OH*

Unrestricted Gifts

Anonymous
Jan Einspahr, *Norfolk*
Dwight & Bette Trumble, *Springfield*
L. Wayne & Mildred Warner, *Gering*

Operating Results and Highlights

The Foundation's 2005 operating expenses include:

Services and Educational Programs.....\$136,224

- Gift planning seminars
- Gift planning – individuals
- Endowment fund development
- Investment services presentations
- Stewardship sermons
- Programs for church groups
- Related salaries and travel expenses

Administrative Expenditures\$109,504

- Accounting
- Audit and legal fees
- Correspondence and communications
- Data management
- Funds management
- Printing
- Related salaries and travel expenses

Facilities, Equipment, Maintenance & Insurance.....\$28,050

Total Operating Expenses\$273,778

2005 Board of Directors & Administration

Elected Members

Kim Dinsdale, *Grand Island – Chair*
Ed Loutzenheiser, *Hastings – Vice Chair*
Jim Cook, *Lincoln – Secretary*
R. David Wilcox, *Lincoln – Treasurer*
Mel Andrews, *Albion*
Rev. Dr. William Deahl, Jr., *Hastings*
Bob Dickinson, *Gretna*
Lynn Flaming, *Elsie*

George R. Kleen, *Franklin*
Rev. Dr. Marvin Koelling, *Kearney*
Sharon Martin, *Riverdale*
Dave Pankonin, *Louisville*
Rev. Bill Ritter, *Columbus*
Rev. Dr. Joe Scahill, *Bellevue*
Dwight Trumble, *Springfield*
Bill White, *Milford*

Appointed Representatives

Rev. Alan Davis, *Sidney - Board of Trustees*
Rev. Matt Fowler, *Kearney - Board of Laity & Discipleship*
Rev. Dr. Charles Spence, III, *North Platte - Board of Mission Outreach*
Rev. Wayne Alloway, *Lincoln - Congregational Development Committee*

Foundation Staff

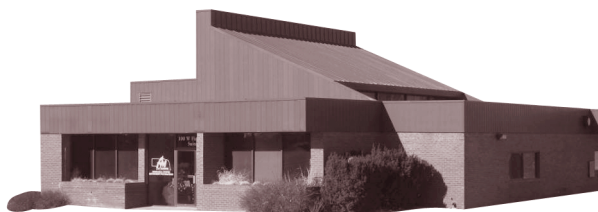
Jim Heller - *Executive Director*
Sarah DeLong - *Foundation Assistant*
Rosanne McClarnon - *Financial Administrator*

Ex-Officio Representatives

Bishop Ann B. Sherer, *Lincoln*
Rev. Dr. Mel Luetchens, *Murdock - Interim Conference Treasurer/Director of Administrative Services & Interim Conference Director of Connectional Ministries*

Mission Statement

The mission of the Nebraska United Methodist Foundation is to **support** the ministries of the local church and the Nebraska Annual Conference of the United Methodist Church through the **development** of gifts and the **stewardship** of resources entrusted to the Foundation in support of God's work.



Nebraska United Methodist Foundation

100 West Fletcher Avenue, Suite 100
Lincoln, Nebraska 68521-3848
402-323-8844 · 877-495-5545 · Fax: 402-323-8840
info@numf.org · www.numf.org