



2018  
Report of  
Gratitude

IMPACT

VISION

GENEROSITY

## Letter from the Board of Directors Chair

Dear friends,

Change is the only constant in life. As the world around us changes, one thing remains the same: the commitment and dedication of the Foundation in its service to United Methodist churches, ministries and individuals. The Foundation embraces and looks forward to the opportunity to celebrate and partner with all Nebraska United Methodist churches, now and in the future.

We don't take the notion of being 'Your Partner in Ministry' lightly. The services we provide, ranging from estate planning for individuals to educational resources for pastors, continue to move us into the future. The Foundation's growth, along with its programs, remains strong and steady. Our assets, at over \$42 million in 2018, represent the growth and strength of our partnerships with churches and people like you. In 2018, through our Gifts from the Heart Endowment, we distributed nearly \$70,000 in grants to new and growing ministries across the state, close to \$30,000 in scholarships to seminary students dedicated to serving in the Great Plains Conference and \$50,000 to help two new churches begin and grow their ministry. The number of church investment accounts grew, along with the number of church endowment funds, and distributions made back to churches and ministries were at an all-time high of over \$4 million.

There is no doubt that change will always be on the horizon, but what is not changing is the Foundation's unwavering partnership with the United Methodist churches and people of Nebraska.

**Thank you for letting us be  
'Your Partner in Ministry.'**

Dr. Marilyn S. Moore • Board of Directors Chair



## Rev. Bob and Lily Berlie

He was instrumental in getting their church to have a photo directory. "It was simple," he said. "You put the right people in the right places, and things just fall into place. God works like that." This seems to be a theme in Rev. Robert Berlie's life. He and his late wife Lily met in this way through the church and together built a life that revolved around their love for God, church and strong belief in tithing and giving back.

When he received his call to the ministry, he had no idea how to do it financially, but he willingly accepted the call anyway. Reflecting on this moment, he says, **"I wasn't a man who knew the Bible well and definitely wasn't in a position to afford seminary school, but I loved God and told Him I would do it if he provided the ammunition. That was the only way. And God has come through for me time and time again."**

Rev. Berlie found himself at a standstill with two years of college left. He was out of money and needed to earn more to continue on. He was working a full-time job during the day and part-time job at night when God stepped in. One night, he met a gentleman who asked, "Did you interrupt your education because you ran out of money?" Berlie confirmed yes, he was working two jobs so he could afford to go back. This man generously offered to fund his way through school, and from that point on, he had all the money he needed to complete his education and become an ordained minister.

Rev. Berlie never forgot the generosity and kindness of this man. So he and Lily decided that it was time to pay it forward. "Lily would find ways to stash away a little here and there,"

# Scholarship Fund

Rev. Berlie reflects. **“She taught me how to save money, and through the years we had built up enough savings to where we felt it was time to make a difference.”**

Soon after, their church received a visit from the Nebraska United Methodist Foundation. “When I saw the Foundation at our fellowship time, it was the perfect opportunity to learn more.” Eventually, they created a scholarship fund that would help other young people get their education. They worked with the Foundation to write their own guidelines and criteria and felt good because they had full control over their money and what they wanted to do with it. The Foundation was there to preserve the fund and keep it working perpetually. The Berlie’s made their first scholarship award to youth in their church in 2015, and since then, 11 scholarships have been given to students from their area. “We support the youth because they are the future of our church. This fund also honors the gentleman who helped me. We ask our recipients to remember this and to pay it forward themselves someday,” Rev. Berlie says.

Rev. Berlie retired in June 2011, and his wife Lily passed away at the age of 81 in April 2017. As Rev. Berlie continues to serve the church in his retirement, he continues to be resourceful in serving the Lord. This has proven true with his accomplishment of creating the first photo directory for his church. As he feels the space in his life that Lily once filled, he also understands that her spirit continues to live on in everything he does, which is why he was determined to include her in the directory.



**In his photo, he is holding a framed picture of Lily, a woman who committed her life to God in so many ways as well. Rev. Berlie finds some refuge knowing that the church and community will never forget her generous spirit, and she will forever leave a legacy with youth through the “Rev. Bob and Lily Berlie Scholarship Fund.”**

# Gardening with the McIntosh Family



In many ways, the work of the Foundation is like that of a gardener. There is much thought that goes into a garden long before the first seed is planted. Likewise, there is much planning, preparation and planting that takes place long before the first petal unfolds. A gardener continues to tend to that garden well after that first petal appears, seeing each new colorful appearance as another blessing from God until the whole area is in full bloom.

The work of the Foundation is similar. Patience, persistence and prayer are involved in a lot of our work. Through our Foundation garden, petals unfold portraying a beauty that is at times breathtaking, and at other times, unexpected. This was the case for former Executive Director, Jim Heller, during his years at the Foundation. A cherished friendship blossomed from a simple phone call from J. Paul McIntosh years ago. "I distinctly remember taking his call," Jim recalls. "He asked if the Foundation was capable of working with him on a trust." Jim worked alongside J. Paul and his wife, Eleanor, for many years as they used the Foundation as a vehicle to give back.

**The McIntosh's were creative with their giving and precise planners, which enabled them to share the blessings God had bestowed on their lives.** Farmland, stock and commercial property sales were just a few tools they utilized to create gifts that impacted their fellow United Methodists. After working with their

financial advisor and the Foundation on a Charitable Remainder Unitrust (CRUT), they also opened a donor-advised fund through the Foundation. The Foundation staff always looked forward to the correspondence from the McIntosh's. A couple of times a year, the couple would request that the Foundation send donations from their fund to various organizations such as their local church, hospital, YMCA and Boy Scouts.

Like a gardener, they were planting their gifts all over their community and beyond. Years later, Jim Heller would receive another phone call from J. Paul that would stick out in his mind. This time, it was asking Jim to be a guest at their 65th wedding anniversary. Jim, of course, accepted the invitation from his dear friend. Both J. Paul and Eleanor have passed away, and the Foundation dearly misses their friendship, but their gardening continues to live on. The Foundation was a beneficiary of their CRUT and is thankful for the gift, but is even more grateful for the ongoing legacy the McIntosh's left. **We still look forward to those distribution requests from their donor-advised fund, except now that correspondence comes from their children, sending gifts from this fund in memory of their beloved parents.**

The seed was sown, and the flower continues to bloom. Rest in peace J. Paul and Eleanor. We are forever grateful for your time with us and the way you gardened during your lifetime.

# Won't You Be My Neighbor?

**“Anyone who has ever been able to sustain good work has had at least one person who believed in him or her. We just don't get to be competent human beings without a lot of different investments from others. From the time you were tiny, you've had people who have smiled you into smiling, talked you into talking, sung you into singing, loved you into loving.” –Fred Rogers**

In Mister Rogers' Neighborhood, everyone was welcomed and valued. Mister Rogers opened his door to all and warmly invited friends to share their talents and ideas. He was a living example of Jesus' desire for us to 'love our neighbor.'

This is why, as you enter a cool and modern, yet warm-feeling, coffee shop type of atmosphere in the Fallbrook Town Square, you see an image of Mister Rogers. The open, airy space, full of natural light streaming in from the large windows, is complemented by hung canvases of religious quotes and bible verses, a high open ceiling, restaurant type tables and chairs, and in the front sits a stool and microphone. This is where Pastor Trever Rook welcomes his 'neighbors.' The space is simple, open and welcoming. “We have people traveling from an hour away to worship with us here,” says Pastor Rook's wife, Alison. “Everyone is our neighbor.”

Neighbors Church started with the idea that people are truly called to love God, themselves and their neighbors. In 2017, a group of people came together with the desire to bring a church to northwest Lincoln that created a safe and loving place where all felt welcome. Under the leadership of Pastor Rook, and with the help of a \$25,000 New Start/New Faith grant from the Foundation, they began the work of becoming a neighbor to those needing it most.

“We serve some of God's most wounded,” Pastor Rook says. “It's incredible the reception you get when you offer something deep and simple. We don't have spotlights and a big stage to work from, we strive for a more simplistic approach to worship.” When one joins Neighbors for worship, they will sing songs, listen to stories from the bible, share communion, and at times, even share a meal. Pastor Rook explains, “There won't be much more on the surface. But I think one can experience something sincere, pure, spiritual, simple, deep and welcoming.”

**Neighbors Church opens its door to all and welcomes people from down the street and those from miles away, to come in and be their neighbor.**



# Ministry Grant Program

## Ministry Grant Program

The Foundation began a formal ministry grant program in 2014 due to a generous and anonymous gift to the Foundation's Gifts From the Heart Endowment Fund. And today, the impact of this ministry grant program is undeniable. Since 2015, this gift has allowed the Foundation to award 122 grants and \$265,000 to churches across Nebraska. The ministries receiving these grants are sometimes well-established, but sometimes brand new. Some ministries serve the elderly and home-bound, while others help pre-school children. The influence of these ministry grants on United Methodists across the state, and the generosity of an individual wanting to make an impact, represents true connection through the church and the Foundation is grateful to be a part of this.



## Little Jewels

The cheering on of a one-year-old taking some unsteady steps, the giggling of a toddler playing make-believe with a friend and the sound of little voices praying before meals are some of the things you hear as you step foot inside Little Jewels Child Care and Enrichment Center. This thriving Center, a ministry of Epworth Village, provides care for children 6 weeks to 5 years in York, Nebraska and opened its doors in May 2018.

As a recipient of one of the Foundation's ministry grants, the Center was able to purchase a curriculum that focuses on STEM subjects, along with social, emotional, cognitive and physical development, all while teaching the love of God. The Foundation is grateful to be able to support United Methodist ministries like these, which are impacting people in our communities across the state.



# A Growing Scholarship Program

## A Partner in Ministry

The Foundation is grateful for the ability to help churches and ministries grow through its various services. Programs like our investment management services, planned giving education and the scholarship and grant programs, are ways in which the Foundation tries to make an impact. Sometimes though, the Foundation's calling is to simply lend a helping hand. This is why when Bob Fitzsimmons of St. Mark's United Methodist Church in Lincoln called and asked for help with its church's scholarship program, we were happy to connect and help in any way we could. Through a few phone calls and meetings, St. Mark's had a formal application process and a marketing plan for its new scholarship program. The Foundation helped through the logistics of this process and is thankful for the opportunity to be a partner in ministry in this way.

The Foundation's scholarship program has changed drastically in the last 10 years, growing exponentially. However, the seed for these scholarships was planted long before that. With planning and vision on the part of the donor and a little help from the Foundation, many seminary students are now feeling the impact of their generosity. Presently, the Foundation has 23 scholarships and over \$30,000 available annually for seminary students and those pursuing a career in church leadership. We want to thank the generous Methodists who, through prayerful consideration, have been able to change lives, and support the church, in this way. Here is a complete list of the current seminary scholarships available:

**Albert R. Murdoch Ministerial**

**Alice Kruse Ministerial**

**Alice Kruse Seminary**

**Alva Clark Seminary**

**Andrew & Nevabelle Howe**

**Atherton Memorial**

**Baldwin F. & Amy L. Kruse**

**Ben & Martha Simmons**

**Cal Leeds Memorial**

**Charles & Marilyn Humphrey Seminary**

**Cowles UMC Memorial**

**Darrell & Joyce Pickett**

**Floma Taylor**

**Harlan & Mabelle Wyrick Memorial**

**Mary Moore**

**Myrtle Williams Seminary**

**Rev. Albert W. Winseman**

**Rev. Richard & Lois Urbach Seminary**

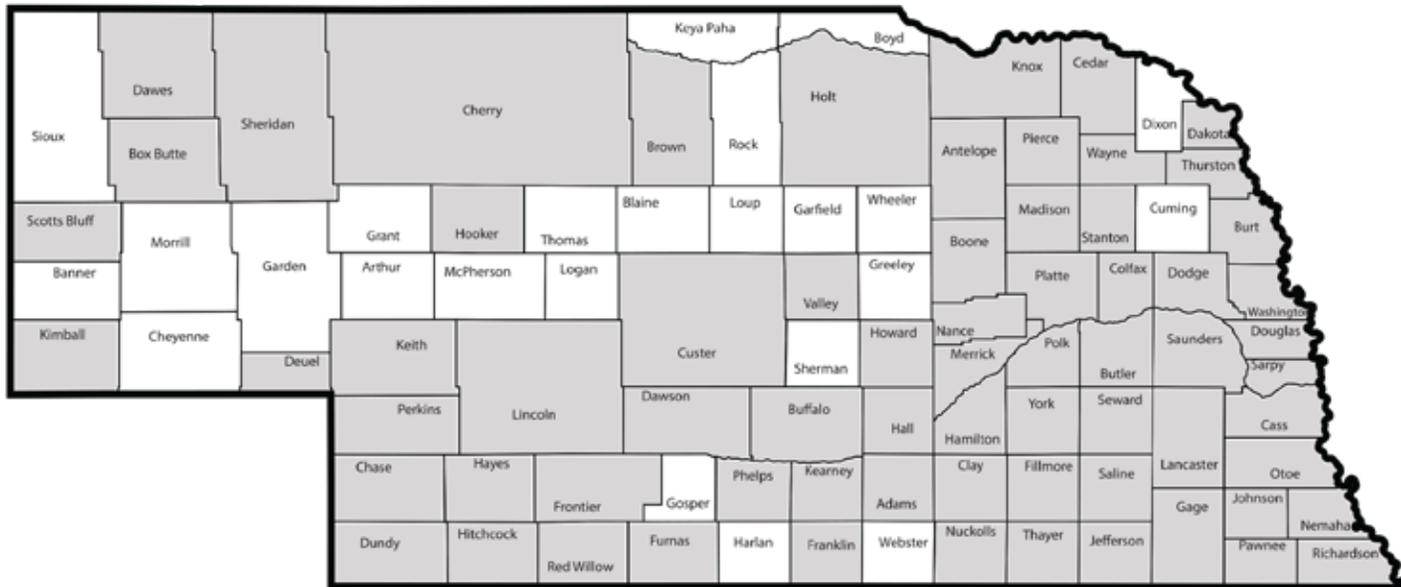
**Scahill Family**

**Tither's**

**Veryl & Sylvia Miller Memorial**

**Women in Ministry**

# Affiliated Churches and Camps



■ Counties with churches or camps using the Foundation's investment services.

Adams UMC  
 Albion First UMC  
 Alda UMC  
 Alliance UMC  
 Arapahoe First UMC  
 Arnold UMC  
 Ashland UMC  
 Auburn First UMC  
 Aurora UMC  
 Beaver Crossing UMC  
 Bellwood UMC  
 Benkelman UMC

Blue Springs UMC  
 Broken Bow UMC  
 Cairo UMC  
 Camp Comeca  
 Camp Fontanelle  
 Camp Norwesca  
 Central City Fairview UMC  
 Central City UMC  
 Ceresco UMC  
 Chadron UMC  
 Chappell UMC  
 Clatonia Salem UMC

Columbus First UMC  
 Cozad UMC  
 Creighton Faith United UMC  
 Crete Grace UMC  
 Culbertson Trinity UMC  
 Curtis First UMC  
 Davenport UMC  
 David City St. Luke's UMC  
 Daykin UMC  
 Denton UMC  
 Dewitt UMC  
 Doniphan Rosedale UMC

Dorchester UMC  
 Douglas UMC  
 Eagle UMC  
 Elgin UMC  
 Elkhorn Hills UMC  
 Elm Creek UMC  
 Elmwood St. Paul UMC  
 Elsie UMC  
 Endicott UMC  
 Eustis UMC  
 Fairbury UMC  
 Fairmont Community UMC

Farnam UMC  
Franklin First UMC  
Franklin Macon UMC  
Fremont Calvary UMC  
Friend UMC  
Genoa UMC  
Gering First UMC  
Gibbon Faith UMC  
Gordon First UMC  
Gothenburg First UMC  
Grand Island First-Faith UMC  
Greenwood Cedar Hill UMC  
Gretna UMC  
Hastings First UMC  
Hastings Grace UMC  
Hay Springs UMC  
Hershey UMC  
Holdrege First UMC  
Hooper Faith UMC  
Humboldt UMC  
Imperial First UMC  
Ithaca UMC  
Johnstown UMC  
Kearney Faith UMC  
Kearney First UMC  
Kenesaw UMC  
Kimball Trinity UMC  
Laurel UMC  
Lexington First UMC  
Lincoln Aldersgate UMC  
Lincoln Christ UMC  
Lincoln Havelock UMC  
Lincoln New Hope UMC  
Lincoln New Visions UMC  
Lincoln South Gate UMC  
Lincoln St. Luke UMC  
Louisville First UMC  
Madison Trinity UMC  
Madrid UMC  
Martell UMC  
McCook Memorial UMC  
McCool Junction UMC  
Milford UMC  
Minden UMC  
Mitchell UMC  
Mullen First UMC  
Murdock Ebenezer UMC  
Nebraska City First UMC  
Norfolk First UMC  
Norfolk Westridge UMC  
North Platte First UMC  
O'Neill First UMC  
Ogallala First UMC  
Omaha Clair Memorial UMC  
Omaha Faith-Westwood UMC  
Omaha Grace UMC  
Omaha Hanscom Park UMC  
Omaha Maplewood UMC  
Omaha Olive Crest UMC  
Omaha Rockbrook UMC  
Omaha Water's Edge UMC  
Ord First UMC  
Ord Mira Valley Evangelical UMC  
Osceola First UMC  
Palisade UMC  
Palmyra UMC  
Phillips UMC  
Pierce UMC  
Plattsmouth First UMC  
Pleasanton UMC  
Ralston Trinity UMC  
Randolph First UMC  
Raymond UMC  
Rosalie UMC  
Rushville Morse Memorial UMC  
St. Paul UMC  
Sargent First UMC  
Schuyler Christ UMC  
Seward UMC Foundation  
Shelby UMC  
Shickley UMC  
Silver Creek UMC  
South Sioux City St. Paul UMC  
Springfield First UMC  
Stanton UMC  
Superior First UMC  
Sutherland UMC  
Table Rock UMC  
Tecumseh First UMC  
Tekamah First UMC  
Trumbull UMC  
Tryon Community UMC  
Utica UMC  
Valentine UMC  
Wahoo First UMC  
Wauneta UMC  
Waverly First UMC  
Wayne First UMC  
Weeping Water UMC  
Wilbur UMC  
Wymore First UMC

# Statement of Financial Position

Assets Held by the Foundation	2018
Unrestricted	\$2,855,843
Temporarily Restricted	\$275,180
Endowments	\$9,671,208
Trusts & Gift Annuities	\$250,351
Managed Church & Ministry	\$28,160,897
Property & Equipment	\$1,217,762
<b>Total Assets</b>	<b>\$42,431,241</b>

Revenue and Support	2018
Contributions to New & Existing Accounts	\$3,977,374
Earnings on Investments	(\$1,659,889)
Fund Management Fees	\$377,789
Income from Endowment Funds	\$71,502
Income from Trusts	\$30,000
Rent	\$3,600
<b>Total Revenue &amp; Support</b>	<b>\$2,800,376</b>

Funds Distributed	2018
Church & Ministries	\$3,244,304
Church & Ministry Grants	\$153,800
Scholarships	\$51,580
CGA & CRUT Payments	\$78,136
Donor Support	\$71,502
Operations	\$419,666
<b>Total Funds Distributed</b>	<b>\$4,018,988</b>

# Five Hearts Society

The Foundation's Gifts from the Heart Endowment was created to allow people to invest in the future. In keeping with our mission, the Foundation created this Endowment Fund in 2001. In addition to named funds that would memorialize individuals and families, Gifts From the Heart focuses on the following endowments: Missions, Youth and Camping, Pastoral Education, New Start/New Faith Communities and Greatest Needs.

Our goal is \$1 million in each of the five funds. To help us reach this goal, we have asked that individuals and churches prayerfully consider a gift commitment at the "Five Hearts Society" level: \$1,000 per year over five years. You can request your gift be distributed evenly among the five endowment funds, or you can specifically request it be applied to just one (or more) of them in particular. This Endowment Fund is responsible for allowing us to distribute ministry grants, scholarships and New Start/New Faith grants. We want to thank the current members of our Five Hearts Society for their commitment to this vision:

**Anonymous (2)**

**Rev. Dr. Alva H. Clark**

**Shirley F. Crump**

**Kim & Tom Dinsdale**

**Randy Fleming**

**Rev. Leonard F. Hartwig**

**Jim & Elda Heller**

**Rev. Dr. Marvin Koelling**

**Alice Kruse**

**Ed & Cora Loutzenheiser**

**Rev. Dr. Janice Japp & Dr. Edward Mantler**

**J. Paul & Eleanor McIntosh**

**Rev. John & Ruby Minert**

**David & Lori Pankonin**

**Stephen & Sue Shull**

**Merle J. Summers**

**Dwight & Bette Trumble**

**Rev. Richard & Lois Urbach**

**Keith & Retha Wycoff**

**Harlan Wyrick**

**Mabelle Wyrick**



**Ministry Grants**



**Seminary Scholarships**



**Estate Planning**



**Investment Services**



**Stewardship & Generosity Services**



**Endowment Fund Development & Planning**

**SERVICES**

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Vickie Yost, Hastings  
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Rev. Craig Collins, Scottsbluff - Vice Chair  
Rev. Lance Clay, Grand Island - Secretary  
Rev. Jeff Kelley, McCook – Treasurer

## Foundation Administration

Marci Logsdon, Director of Finance  
Jackie Urkoski, Director of Operations

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

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