

# YOUR PARTNER IN MINISTRY

2022 ANNUAL REPORT





# A NOTE FROM THE EXECUTIVE DIRECTOR

I grew up attending the Valley United Methodist Church - truly a church family, truly a home. It was not perfect, but it was a community that served the community. While there were youth in the church, the finances could not keep up. The Valley UMC closed in the early 2000s, and I still miss it.

Could this be your church's future? If that's the road your church is on, what can be done to change that path?

Nebraska United Methodist Foundation exists to help you with the future. Generations before you may have provided a gift that still sustains your church today. You can do that for the next generation. You just need to plan in advance.

Why should you consider NUMF or any investment service at all? Each church and ministry is tasked with being good stewards of the funds entrusted to them. While it is likely safe to have your church's funds held at your local bank in a checking or savings account, there are times when it is appropriate to do something more.

We serve your church. The Foundation provides investment services to help your church save and grow funds for both short-term and long-term ministry, capital needs, emergencies and mission opportunities in your community and beyond. Our focus is to help

Nebraska Methodist churches, ministries, and members accomplish their goals and missions. We are a free resource.

NUMF has five investment accounts for you to choose from to invest your church's funds. These funds are administered according to investment guidelines set forth by our Board of Directors and per our Investment Policies. Each portfolio is managed with a specific investment objective, whether it be conservative in a fixed-income fund to maximize present income with minimal risk or risky in the equities fund to get a higher total rate of return with a primary purpose of long-term appreciation.

We serve you, as an individual. Here are where the nuances of what the Foundation can do come into play. You may be in a situation where your children are well off and can provide for themselves. You may not have any heirs at all. You may have

***We can help you  
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saved and collected appreciated assets throughout your many years and have now come to a point where you can help a charity make a real difference. We can help you organize and prioritize your assets to make the biggest impact and leave a legacy,



anonymously or not. The goal is to make a plan. NUMF staff are trained to help you in this way, but we need you to reach out to us to let us know that you would like to make such an impact.

With advance planning in your estate documents, retirement plans, or insurance policies, you can help your church, your favorite ministry, or the Nebraska United Methodist Foundation itself to make an impact in your local community or statewide! We can create a plan so that your church or ministry is not the next Valley United Methodist Church. Take that first step and contact us at 402-323-8844.

We are pleased to be 'your Partner in Ministry.'

Kristine Roberts  
Executive Director

**NEW START /  
NEW FAITH  
GRANTS  
\$70,000**

Due to the generosity of donors supporting congregational development, the Foundation was able to award \$70,000 in New Start/New Faith grants. These grants are available to enhance and support new church development. The Foundation is grateful to be able to support new church growth in this way.

**MINISTRY  
GRANTS  
\$100,000**

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# WILBER UMC & NEBRASKA UNITED METHODIST FOUNDATION PARTNER TO BURN THAT MORTGAGE!

Like many congregations, the Wilber United Methodist Church had a church building that had served the congregation well for many years, and was filled with memories of family and community events that had taken place within those walls for several generations. But over time the needs of the church changed, and the congregation was faced with the decision on whether to upgrade the current building, or replace it with a new structure.

With a vote of the congregation the decision was made to replace the current structure with a new handicapped accessible building, which would serve the congregation for many years to come. As design work was completed a financing plan was developed, with a goal of

*The NUMF staff was a pleasure to work with throughout this process, and the Foundation played a very valuable part in helping us to reach our financial goals.*

**Chris Cervený**



1) paying a third, 2) raising a third, and 3) financing a third of the funds needed. With those plans developed and approved, ground breaking took place in the spring of 2017.

Through the hard work, dedication, and generosity of many individuals, the church building was completed as planned, and the original 15 year note was paid off in just 4 years.

A huge part of the success of this project was the forethought of many past and present members and families, whose financial gifts and stewardship allowed Wilber UMC to develop a workable financial plan. As part of this plan, the church finance committee had invested money with the Nebraska United Methodist Foundation, allowing it to grow in

a safe and profitable manner over many years. When the time came to fund the new church building, staff at the NUMF were very flexible in establishing a process to move funds when and where needed, in order to meet the obligations of the church.

"The NUMF staff was a pleasure to work with throughout this process, and the Foundation played a very valuable part in helping us to reach our financial goals," said Chris Cervený, member of Wilber United Methodist Church Finance Committee.

The Nebraska United Methodist Foundation wants to do the same for you. Partner with us to accomplish your goals and spread God's love throughout your community.

Foundation's Board of Directors and staff to thank the many Nebraska United Methodists who continue to strengthen our ministries. The Heart Program. Due to your generosity, the Foundation was able to award \$100,000 in grants to Nebraska churches and ministries.

**SCHOLARSHIPS**  
**\$50,000**

The Nebraska United Methodist Foundation was able to distribute over \$50,000 in scholarships to 19 students pursuing ministry. These scholarships would not be possible without donors. Thank you to all the donors and their families for relieving the financial burden of our future pastors.





# GIFTS FROM THE HEART

## MAKING AN IMPACT IN NEBRASKA

The Nebraska United Methodist Foundation has done so much to help our local churches and ministries thrive by being your Partner in Ministry! In 2022, we have awarded over \$100,000 in ministry grants to help ministries and outreach in your church community. With the generous donation of Dr. Dean and Keitha Thomson, we have sent people on mission trips to spread God's love outside of our local communities. We have distributed over \$50,000 to nineteen students; students just starting their career and students looking to help as they retire. Our mission is to help each student as they go on their spiritual journey with seminary and course of study scholarships.

"Having served on the Foundation Stewardship Committee I have seen the difference grants and scholarships

make in the lives of individuals and churches. I want my money to help make these differences," said Marilyn Zehring, member of NUMF Board of Directors and Five Hearts Society.

*For I know the plans I have for you, plans to prosper you and not to harm you, plans to give you hope and a future.*

**Jeremiah 29:11**

Did you know that together, we can do more? The Nebraska United Methodist Foundation has its very own Legacy Society in which you can be a member! At NUMF, we continue to discuss issues of purpose and identity and to concentrate on

being a "beacon of light" for our churches and donors. That is why it is so important for us to be as financially strong as possible so we will have the resources to live out our purpose to help congregations live out theirs. Consider joining our Legacy Society to further the mission of the Nebraska United Methodist Foundation for generations to come!

Our Giving Society, the "Five Hearts Society," is an option that consists of donors who wish to commit \$5,000 within a five-year period of time in support of any, or a combination, of the five endowment funds that make up the Gifts From The Heart Endowment Fund at NUMF. Individuals and churches are eligible for membership in the "Five Hearts Society." You can also remember the Foundation in your estate planning to be in our Legacy Society.

## THE GIFTS FROM THE HEART ENDOWMENT FUND

**MISSIONS ENDOWMENT:** For centuries, the heart and soul of the Methodist Church has been our caring compassion for others who are less fortunate. This endowment encourages putting faith and love into action through engagement in our world. It provides support of mission trips and other involvement that promotes local, national, and global engagement.

**YOUTH AND CAMPING ENDOWMENT:** This endowment encourages, searches out, and supports camping and new and unique church youth programs which will attract more youth to the church, provide a strong foundation upon which our youth build their lives, and encourage youth to become leaders in their church and communities.

**GREATEST NEEDS ENDOWMENT:** This endowment supports us in aggressively seeking opportunities to provide help where needed; where it makes a difference in lives; where it gives hope; where it helps a church to grow; wherever we can be of service.

**PASTORAL EDUCATION AND SUPPORT ENDOWMENT:** This endowment provides financial support to pastoral students during their course of study, and assures that pastors can participate in continuing education.

**NEW START/NEW FAITH COMMUNITY:** New Start/New Faith Community congregations incur significant start-up costs, and they look to their church family for financial assistance in their early, formative years. This endowment helps to assure that young congregations have every opportunity to succeed in bringing God's love into their members' lives.

## HOW DO YOU GET STARTED IN LEAVING YOUR LEGACY IN THIS WAY?

**STEP 1:** Give us a call! Let's talk about what you have in mind and what might be the best way to get started.

**STEP 2:** Follow through! Turn those good intentions into action. The Nebraska United Methodist Foundation staff is here to help you turn your charitable vision into reality. Call us at 402-323-8844 or visit us online at [www.numf.org](http://www.numf.org).

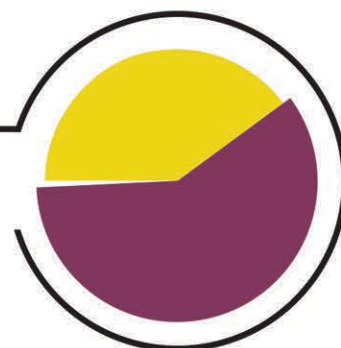


# 2022 MINISTRY FINANCIAL REPORT

To the churches, ministries, and individuals who use the Foundation's services, we would like to thank you for allowing us the opportunity to serve you. For those who haven't yet experienced the services we can provide for you, we would welcome the opportunity to be your Partner in Ministry. Our contact information is on the back of this report.

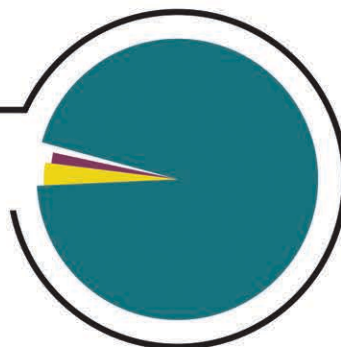
## INCOME

Contributions to New Accounts	\$1,943,333	●
Contributions to Existing Accounts	\$3,079,059	●
Rent and Farm Income	\$23,620	○



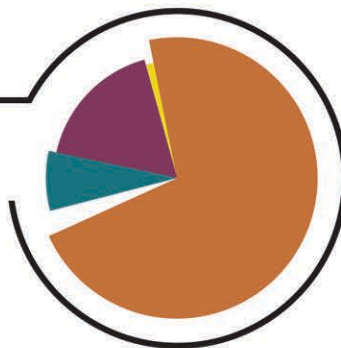
## DISTRIBUTIONS

Distributions to Churches and Ministries	\$3,422,470	●
Grants	\$232,216	●
Scholarships	\$65,971	●
Life Income to Donors	\$25,338	○



## ASSETS Total: \$51,832,176

Funds without Restrictions	\$3,507,760	●
Endowment and Designated Funds	\$10,493,521	●
Managed Church and Ministry Funds	\$36,475,350	●
Trust and Gift Annuities	\$176,797	●
Property and Equipment	\$1,178,748	○



The Foundation provides **Investment Services** to help churches save and grow funds for ministry, capital needs, emergencies, and mission opportunities in the community and beyond. Our focus is to help Nebraska Methodist churches and related organizations and ministries accomplish their goals and their mission.

Individuals can create **Endowment Funds** and **Donor Advised Funds** that would help their local churches or ministries accomplish their goals and support their work for years to come.

**Charitable Remainder Unitrusts** and **Charitable Gift Annuities** are ways to provide life-time income for the donor and also leave a legacy.

# BOARD OF DIRECTORS

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## EX-OFFICIO REPRESENTATIVE

Dr. Marilyn Moore *Lincoln*  
**Past Chair**

## FOUNDATION STAFF

Kristine Roberts  
**Executive Director**

Christy Bousquet  
**Administrative Assistant**

Marci Logsdon  
**Director of Finance**



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