

### Already Established Funds in our Endowment Fund

Gifts of more than \$1,000 can be placed in one of our existing funds. Income from this fund then provides support for:

#### Evangelism/Outreach

Supports ministry, outside speakers, For The Fort, hurting people everywhere

#### Family Ministries

Areas, such as camping, missions, parenting, Canvas, and Christian life development

#### Fine Arts

Expand worship, choir, sound, special events and drama

#### Facilities and Equipment

Capital improvements, major repairs, computers, software

#### Undesignated Fund

Gifts to this Fund are not designated for a particular purpose or restricted. Funds are used to support ministries or missions selected by the Endowment Committee.

#### Designated Fund

This Fund requires a gift or donation of at least \$50,000. Donor may select specified areas that they want grants to be given to, in the future. No changes can be made after the initial donation. Certain exceptions may apply.

### Grant Process

Grant applications are available in the church office or from the Endowment Committee. Applicants should fill out and fully explain their request. The whole Endowment Committee will review the request and note on the grant. Grants may be denied or approved, as requested, or with partial amounts. Applicants will be notified.

'Be generous with what God has given you, to serve others,  
faithfully and administering God's grace in its various forms'

1 Peter 4:10

## *Endowment Fund* St. Joe United Methodist Church

Ft. Wayne, IN 46835



You have practiced a life of giving and serving.  
Now, St. Joe UMC provides an opportunity  
for legacy giving and planning.



#### Mission

St. Joe UMC Endowment Fund provides an opportunity for parishioners or supporters the means to gift to the church in a way that will provide financial support to the church and it's ministries ever lasting.

- 🍎 The Purpose of St. Joe UMC Endowment Fund is to provide a:
- Means for members and friends to make gifts and bequests to the church
  - Permanent endowment of financial support and long-term growth

- 🍎 The Goal is to provide:
- Safe/secure options for donors to make a gift now that gives forever
  - Financial assistance for ministries:
    - to promote religious programs and projects;
    - that serve our church;
    - that serve our community.
  - Permanent financial assistance that continues to serve after one's lifetime

- 🍎 The Pledge is to provide:
- Accountability to our congregation
  - Prudent and professional investment managers of endowed assets
  - Responsible charitable distribution
  - Options available to serve the areas of interest of the donor

- 🍎 The Duty is to:
- Thoroughly follow the instructions of the donor and 'Donor Bill of Rights'
  - Fully explain the contribution and distribution steps
  - Make simple the contribution process
  - To serve our donors and congregation

### How does an Endowment Work?

An endowment fund is a lot like a fruit tree. A fruit tree is not grown to provide lumber, rather it is grown and nurtured to produce fruit. A fruit tree with care, nurturing and proper management will produce a crop of fruit every year for many decades.

Likewise, an endowment fund can produce annual fruit (interest) every year. By only using the interest of the fund each year to provided grants, the principal is retained and never depleted. Therefore, it will provide income to fund grants for decades, even centuries.



### How can you establish your own endowment fund in the St. Joe UMC Endowment Fund?

With \$1,000, an endowed fund can be established or for less an endowed fund may be a part of a bigger endowment fund. With this gift, you can specify how the annual income from your funds is to be used. You could specify things (but not limited to) such as:

- 🍎 Evangelism and Outreach
- 🍎 Fine Arts
- 🍎 Family Ministries
- 🍎 Facilities and Equipment

### Gifts to the Endowment Fund

- 🍎 Gifts to the Endowment fund will be held in perpetuity, if not otherwise designated by the donor, with income to be used to fulfill the purposes of the church in Christian ministry and mission.
- 🍎 The Endowment Fund is intended for purposes that are not a part of the church's established programs, which are funded, or should be funded, through the annual operating budget of the church and the regular giving of those attending.
- 🍎 It is not intended that the Endowment Fund provide for church general operating expenses. It is intended that the church annual budgetary process, together with annual giving, shall support normal and customary church activities.
- 🍎 Endowment Fund income should only be used to go beyond normal church activities.
- 🍎 The church, in this document, means Saint Joseph United Methodist Church of Fort Wayne, IN, and any of its ministries, and may include any ministries of the Indiana United Methodist Church, as well as the ministries of the United Methodist Church nationally or internationally, or any other ministry, unless designated by the donor.