



Frequently Asked Questions

What does the Mid-Atlantic United Methodist Foundation do?

The Foundation assists your congregation in meeting its investment and stewardship goals. Pooling the resources and potential of more than 392,000 United Methodists in 1,700 area churches, we provide professional, personalized consultations to enable your church to grow your assets while minimizing risks. Through the Foundation, each of the socially responsible investments is screened to ensure it is in keeping with United Methodist values and principles. In addition, as partners in your stewardship journey, the Foundation will help your church to create a culture of generosity that permeates through every aspect of your congregation's life.

Why should our church utilize our local Mid-Atlantic United Methodist Foundation?

The bottom line is that the Foundation is the best at what it does – creating opportunities for giving and investment that enables your church to accomplish all God is calling it to do and be. The Foundation:

- Has competitive investment returns with the nation's leading investment firms;
- Can suggest a wide array of personalized investment strategies tailored to the needs of your church;
- Shares connectional values and enables affluent churches to assist and grow those churches that might have less;
- Uses money to do ministry, building a better, more just world through socially responsible investing;
- Gives funding to a variety of missions and ministries in the Eastern Pennsylvania, Peninsula Delaware and Baltimore-Washington Conferences;
- Trains churches on best practices in stewardship;
- Shares resources on endowments, trusts and planned giving;
- Provides speakers to inform, inspire, and engage churches in transformative stewardship.

Can't I just use someone from my own church?

The Foundation will work carefully in consultation with the stakeholders in your congregation to ensure their expertise and gifts are used to benefit the church. However, because of the sometimes sensitive and volatile nature of finances and investments, it is not recommended to have a single person in the pews overseeing these important decisions. We recommend that members provide oversight and work with the Mid Atlantic United Methodist Foundation. In addition, by investing with the Foundation, it allows your church to be connectional, assisting others in the denomination by helping them invest in a vital future as well.

What other benefits are associated with the Foundation's services?

As partners in ministry, the Foundation also offers a number of free services to our local churches, including a number of materials on a variety of stewardship topics that can be instrumental in helping a church set up an endowment or to begin a program of intentional "Planned or Legacy" giving. The Foundation also provides at "no cost" (to the church) gift stock program where a donor can provide the full market value of a stock to his church. Members of client churches may receive discounts to many of the Foundations programs.

What does the Foundation do in addition to investment management?

Some highlights for the year 2016 included:

- Successfully graduated 62 pastors from the two-year **Financial Leadership Academy (FLA)** program committed to financial educational training for pastors. Enrolled a second group of 52 pastors into this very worthwhile program.
- The distribution of \$ Millions in ministry funds to our client churches.
- Matching grants of more than \$30,000 were made to ministry and relief efforts.
- Is the fastest growing United Methodist Foundation in the US for the past 5 years.
- Added Boston Partners (Boston, Massachusetts) for Investment Management in the Large Cap Value Equity sector
- Investment process continues to place us in the top 10% of United Methodist Church SRI investment managers.
- Average increase in giving indication was **13.5%** during Foundation led Stewardship Sundays.

100% of assets invested through the Mid-Atlantic United Methodist Foundation are committed to be managed according to the Social Principles of the United Methodist Church as established in the Book of Discipline. Foundation staff helped numerous churches set up their investment, gift, and disbursement policies, while providing much Stewardship information and materials. Many Endowments have been started with the Foundation's help.