



A Message from Jack Brooks, Executive Director of the Foundation

The Investment Markets and COVID -19

There are moments in life that are unplanned, unexpected, and test us to adapt the way we serve Christ. Over the past few weeks the world investment markets have declined sharply in response to COVID – 19. I want to reassure the churches that invest through the Mid-Atlantic United Methodist Foundation that we are monitoring the ever-changing markets. As a CEFEX Certified Fiduciary we have pledge to always follow the highest standards of investment care and must place our client’s interest above our own. We remain in constant contact with our consultants, investment partners, and service providers on your behalf.

Many of you anticipate a challenging ministry funding environment over the next few months. Our board, staff, and generosity consultants have developed high quality stewardship education materials and programs to meet the urgent need of our churches. We remain a recognized thought leader with deep understanding to meet the wishes of our donors, and the needs of the local Church.

You have chosen to partner with the Mid-Atlantic United Methodist Foundation for stewardship and investment services in both good times and in bad. We are ready and prepared to help you during this global crisis with all our available resources.

Limiting Travel and Exposure

We understand that many people throughout our United Methodist Connection want to limit exposure to COVID-19. We are monitoring the information, recommendations, and mandates that come forward from the federal government and the state agencies in the states where we conduct business. Your congregation may choose to avoid going to church or holding regular meetings and may limit travel to any off-site group events. There are many ways you can continue to conduct business with us without coming into our offices, or having our staff traveling to your church during this challenging time. Direct all calls to 484-762-8211 to discuss the options.

2 Websites

Main Website: www.midatlanticfoundation.org

Legacy Planning Website: www.maumlegacy.org

P.O. Box 820, Valley Forge, PA 19482  midatlanticfoundation.org 484-762-8211

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We are committed to having our most current ideas on stewardship, generosity, and connecting with donors on our main website under the [Education](#) tab. Our Legacy website has news from Washington and ideas for peoples considering making a planned gift for the future.

Investment information can be found under the [Investment](#) or [News](#) tab of the main website. You will find market updates, portfolio updates, and market research. Our 2 websites provide links to other information that may help your church stabilize giving and shape your church's culture of generosity well beyond the immediate needs of today.

Your Foundation is committed to making an abundance of distance learning options available to you. This includes current articles, video links, conference calls, Facebook page, and our new YouTube video channel. Cutting edge generosity and investment content is being developed and will be released as it is completed. I recommend you visit our two websites frequently and like our Facebook page at <https://www.facebook.com/Midatlanticfoundation.org/>.

Public Events and Education

The Foundation has suspended all scheduled onsite education programs and public events under the recommendation of our Stewardship Education Committee, Board of Directors, and the Annual Conferences we serve. This is not a permanent decision. Connect with us to plan specific programs and topics for sometime in the future.

Withdrawal of Funds

If your church needs funds beyond your regularly scheduled distributions we can assist you. Your own internal policies and procedures govern if your investments with us are restricted, unrestricted, defined purpose, or endowed. Each church is unique and each account you have with us has an identified purpose. For clarification call us at 484-762-8211.

Liquidity

As a reminder, we distribute all non-money market funds requested by you at the end of each month for payment the first week of the next month. Please call or check our online policies for more clarification.

Signing Documents

We can send you a secure email with the documents and instructions to sign electronically. This may be used to open an account, facilitate a donor contribution, or process many other needs.

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Account Investment Allocation Changes

Market volatility can provide new opportunities. Investment account allocation changes are made to each investment account by using our *Risk Profile and Assessment* questionnaire. Investment allocation changes will take place at the first of each month. Please call or email us to request an updated copy of this document and discuss your church's specific needs.

If You Decide to Visit Our Office

If you decide to conduct business with us in person, please be assured we have taken precautions to keep our customers and employees safe.

- Our staff is spread out in various locations to lessen the risk of exposure in each office. Some staff may not be at their usual location but are still available to speak with you by phone, by email or text.
- Any employee who has traveled by air has a 14-day restriction before they can return to our office and must work remotely during this time.
- Hand sanitizers are available for all visitors and employees.
- Our offices are thoroughly cleaned daily, with special attention to public areas and often-touched surfaces, such as elevator buttons and doorknobs.

Protecting you and our employees is our top priority. We are continually monitoring the Center for Disease Control and government public health agencies for recommendations and will adjust our practices as necessary.

I want to thank you for the confidence you place in us. Our sacred trust is to put each of our client's interest above our own. We continue to adjust the way we are called to serve Christ together each and every day.

Be the Blessing,

Jack Brooks
Executive Director
Mid-Atlantic United Methodist Foundation

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