



**Matthews United Methodist Church**  
**Endowment Committee**  
**Report to the Congregation**  
**2019 Activity and 2020 Plans**

MATTHEWS UNITED METHODIST

**Year in Review**

In only our second full year of existence, the Matthews United Methodist Endowment program experienced significant progress in several areas:

- The Endowment Committee worked aggressively to expand and enhance the communications and operational aspects of the program by:
  - Keeping the Endowment website current with new information and updates
  - Reviewing policy and procedures to determine revisions and recommendations needed as the program grows
  - Assessing the endowment programs and communications material from churches across the country
  - Holding a lunch and learn session in December with Tom Dundorf, President of Family Wealth Partners to highlight 2019 changes in tax law and ways that donors can continue to maximize impact of their charitable contributions
  - Hosting the first Legacy Dinner Celebration in May to highlight progress to date and communicate the endowment purpose and structure to interested congregants
    - Approximately 40 attendees enjoyed dinner and entertainment in the commons
    - Highlights of the program included insights from David Snipes, UMFWNC President, on the importance of a strong endowment program and sharing from Russ and Margaret Rogers on what the church has meant to them and why they were early supporters of the endowment program
    - The program identified a number of families interested in learning more about how to include MUMC in their estate plans. Follow up meetings with those families were scheduled in the second half of 2019.
- Contributions to the endowment grew to \$186,325 by the end of 2019.
- Specific identified estate gifts totaled over \$240,000, bringing total gifts and future commitments to \$446,325 at 12/31/19.
- Additional estate gifts (unspecified dollar amounts) were committed and documented to the appropriate fund indicated by the donor's letter of intent (General Fund, Missions Fund, Congregational/Professional Development and Facilities and Capital Improvement Fund).
- Driven by strong market performance in 2019, the value of the invested endowment gifts grew to \$212,117, and provided the church with the opportunity to distribute over \$6,000 in endowment earnings to church operations for 2020.

**2020 Plans**

While the endowment program made significant headway in 2019, the committee begins 2020 with a full slate of activities:

- Meeting with each Adult Sunday School class to update on progress of the endowment program and answer any questions they might have.
- Implementing a communications plan that includes monthly "celebration" updates, screen messages between worship services, an all church mailing, and a video documenting the reasons supporters are committing legacy gifts to MUMC.
- Planning for our second annual Legacy Dinner Celebration on May 14<sup>th</sup>. All endowment supporters and those interested in learning more about the endowment program are invited to attend. More details on this event and how to reserve your spot will be coming in March.

Thank you to all who have joined us in this effort to establish an endowment program that will support the mission of MUMC in perpetuity. If you have any questions about this information or want to learn more about the Matthews United Methodist Endowment fund, please let me or Pastor Chuck know by completing the "Please Contact Me" form on the website.

Your Friend in Christ,

Terry Efird  
Endowment Committee