



The Matthews United Methodist Endowment

A Permanently Restricted Endowment Fund For

Matthews United Methodist Church

Preserving a Legacy to REACH. TEACH. PRAISE. SERVE.

Matthews United Methodist Endowment (the Endowment Fund), a permanently restricted endowment fund of Matthews United Methodist Church, Matthews, North Carolina was established September 25, 2017 for the purpose of providing members and friends of MUMC the opportunity to make charitable gifts to the church that will become a permanent source of financial support. The Endowment Fund is intended to ensure the long-term sustainability of the church mission and is not intended to replace the annual operating budget of the church and the regular giving of its members as the primary means of funding church ministry.

Gifts to the Endowment Fund will be invested in a portfolio of stocks and fixed income instruments with the long-term objective of protecting the purchasing power of principal (donor gifts) and the generation of income which can be used to support church ministry.

Gifts to the Endowment Fund may be directed by donors to one of the following categories:

1. **General Endowment** to support the programs, ministry areas, and general operations of the church as determined by the Finance Committee.
2. **Mission Fund** for missions in and beyond the local church and community, consistent with the direction provided by the Global Impact Committee.
3. **Capital Improvements and Renovation** to support the major maintenance and improvements of church facilities as determined by the Trustee Committee.
4. **Professional Development** to provide support beyond the annual budget for educational and training opportunities for staff, clergy and congregants as determined by the Senior Pastor and the Staff Parish Relations Committee.

Gifts to the Endowment Fund that are \$50,000 or less may be directed to one of the four fund categories listed above for general purpose use within the category. Donors making gifts with a value greater than \$50,000 and who desire to make a more specific designation within the categories should contact the Endowment Committee chairperson or the senior pastor to discuss the objective and feasibility of that designation.

If you would like to include the Matthews United Methodist Endowment in your estate planning process, please feel free to share this document with your attorney or financial planning advisor. You may also contact the senior pastor or the chair of the Endowment Fund Committee to schedule a time to learn more about the Endowment Fund.

Matthews United Methodist Church does not provide investment, tax or estate planning advice to any individual. Any decisions that you would like to make based on the information provided herein should be reviewed with your professional advisor.