



MATTHEWS UNITED METHODIST CHURCH  
Endowment Committee  
Report to the Congregation  
2022 Activity and 2023 Plans

### Year in Review

In August, 2022 the Endowment program at Matthews celebrated its five year anniversary. After working through the initial launch of the program in 2018 and 2019, and the limitations of COVID in 2020 and 2021, it seemed like 2022 was the year where awareness and understanding of the Endowment program reached a level of consistency across the congregation. It was also a year where contributions and estate gifts to the endowment set a new record (\$126,250). Activities in 2022 included:

- Visited all Sunday School Classes with distribution of material on the Endowment Program.
- Annual report was mailed directly to each member of the congregation.
- Continued meeting with interested families for lunch and a detailed discussion of the Endowment Program, resulting in additional current giving and future consideration/inclusion in estate plans.
- Added an Endowment Program component to the New Member program.
- Held our annual Legacy meal in November, with Dr. Ken Lyon returning as our featured speaker and with musical entertainment provided by Trip Rodgers. The luncheon format allowed for a different group of attendees than an evening meal, but with a few less in attendance. The combination of ticket sales and contributions increased the General and Missions Endowment funds by \$5,750 in November.
- Continued to develop, refine and implement communications opportunities.

Contributions and estate gifts to the Endowment were \$126,250 in 2022, increasing the invested balance (gifts received) to \$431,169 at the end of 2022. The market correction in 2022 erased all of our residual appreciation. With our endowment portfolio value at \$431,024 at year end, we were \$145 below the amount contributed to the endowment. The ending fund balance is net of earnings distributions which have been made for the past three years to support church operations. **Since 2021, endowment fund distributions have supported LED lighting changes in the Sanctuary, sound repairs in The Commons, expanded seating in the Choir Loft, the Bus Ministry, the 2021 Christmas Concert, website enhancements, new hymnals, The 2022 distribution from the Kenneth Conley Facilities Improvement fund will go to renovations in the Sanctuary Reception Area.**

### 2023 Plans

With the Endowment Program an integral part of stewardship at MUMC, the challenge going forward is to make sure that the Endowment remains top of mind for our congregants when they are making their estate planning decisions, as well as engaging new members as they enter MUMC. We will continue to use Pre-Worship slides and campus monitors, Celebration Newsletter, Just These Lines, Realm, MUMC Website, videos, classroom visits, lunch and learns, email and direct mail communications to ensure that all members of the congregation have an awareness of the Endowment program and how they can participate.

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 contact Pastor Chuck by calling the Church Office or completing the "Please Contact Me" form in the Endowment section of the MUMC website.

Your Friend in Christ,

*Terry Efir*

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Endowment Committee