











United Methodist Foundation of WV, Inc.

2007 Annual Report

UNITED METHODIST FOUNDATION OF WV 2007 EXECUTIVE SUMMARY

2007 Highlights

-  Total Assets under Management \$50,362,067
-  All gifts and deposits amounted to \$2,553,713
-  \$2,669,420 distributed from endowment trusts and custodial accounts for use in ministry
-  5 new Gift Annuities totaling \$493,352
-  \$168,838 distributed as income to beneficiaries of unitrusts and charitable gift annuities
-  Eleven new Custodial (deposit) Accounts established totaling \$224,529
-  Ten new Permanent Trusts established totaling \$152,109
-  \$620,502 total in stock transfers processed as charitable gifts



David R. Peters Jeffrey A. Taylor

This past year has been another year of continued growth for the UM Foundation.

In addition to the numerical growth of the assets under management is the growth in the breadth of the UM Foundation's outreach and ministry to increasing numbers of donors, more local UM Churches, and more financial resources for the ministries of the local UM Churches and all the Conference-affiliated institutions, agencies, mission projects, and special ministries.

In the past year the UM Foundation received nearly \$1 million dollars in charitable gifts. The Foundation's staff helps individuals structure their giving: when to give, what to gift, how to gift it (a bequest, charitable gift annuity, gifting appreciated assets, etc.), how to provide for the financial security of loved ones and still make a gift for the Lord's work!

In 2007 over \$1.5 million dollars was deposited at the UM Foundation for investment purposes. Most of these monies were previously given to the local UM Church and were residing in lower yielding accounts. These custodial accounts remain the property of the local Church. The Church selects from among several investment objectives in placing the account with the Foundation. All of these accounts are from the day of deposit to the day of withdrawal: no maturity dates, no penalty to withdrawal monies, and when you notify the Foundation of your withdrawal of any or all of the account – you have it in one or two days (or electronically).

Both the charitable endowment gifts and the custodial/deposit accounts are invested by the UM Foundation according to guidelines of our Church's Social Principles.

We are grateful for all the persons who have contacted the UM Foundation for information about their personal stewardship and charitable plans. We are grateful to partner with local UM Churches who have turned to the UM Foundation to enable the local UM Church to be a good steward of its financial resources, as well.



UNITED METHODIST FOUNDATION OF WV 2007 HONORARY AND MEMORIAL GIFTS

Memorial Gifts

are made in memory of departed loved ones whose lives live on through their examples of Christian ministry.

Rev. Charles Andrews
Hiawatha Board
Dr. James E. Brimhall
David Coffindaffer
Dr. Claude Collins
Naomi Rose Corn
Roy R. & Sylvia M. Cox
Louis Damron
Pearl Davis
Joe Dress, Sr.
Rev. James R. Dumire
Sarita Easley
Lena Eaton
Elmer Fike
Bert Foutty
Irma Francis
Bob Grove
Virginia "Tots" Hale
Wayne & Mary Haynie
Paul S. Hinkle
Phyllis A. Holtzworth
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James Hunter
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Dorothy Johnson
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Dr. Ray Kessell
Andrew Ketterman
Howard E. Kyle
Nellie Lilly
Patricia Liming
Ronald Alan Linger
Clariece Lux
Ernestine Mallory
Gerald P. Marks
Henry & Agnes Martin
Albert "Vic" Mays
Howard McCoy
William Meade, Sr.
Irene D. Meagle
Joan Scaggs Means
Horace G. Mitchell

Emily Moore
Rev. Thomas Moore
Anna Morrison
Emily E. Myers
Orvil Napier
Dr. Jack D. Robertson
Dr. Raymond Marquess Rowe
William & Bea Shire
Sam & Rebecca Ladosca Sink
James R. "Jim" Skiles, Jr.
Roy & Ruby Skiles
Col. Bradley E. Smith
Dr. George R. Smith
Dr. Bruce O. Snider
William "Bill" Stanley
Dorman Stewart
Jerry Stidham
Ethel Stout
Mary Jo Tharp
Charles & Effie Thompson, Sr.
Patricia Thompson
James F. Turner
Karen Varassi
Wade T. Watson
Alberta J. Wegley
Imogene Willard
Dr. William A. Woods
Bernie Workman
Rev. Karl Wright



Flanagan Hill UM Church
Red Creek, WV

Honorary Gifts

are given in honor of individuals and institutions that have touched our lives through Christian love and service.

Cindy, David, Elizabeth & Victoria Barnette
Edward & Pam Barnette
Fred & Ruby Batten
Rev. Helen Davis Bell
Buffalo UM Church, Buffalo
Dr. D. Keith & Kay Clarke
Elizabeth Collins
Rev. David E. Erenrich
Dr. & Mrs. E. Wendall Eskew
Rev. Leo & Barbara Farley
First UM Church, Gassaway
Rev. Margo E. Friend
David & Judie Gommoll
Dr. Ed Grant
Frank E. Hanshaw
Patricia Kent Johnston
Shelby & LeAnn Litton
Lynn & Janet McCauley
Rachel McMullin
Ruth Mollohan
Carol J. Moss
Rachel & Kathryn Moss
Rev. David R. & Harriet G. Peters
Sheila & Joseph Peters
Dr. Chuck Pullins
Virginia Rouse
Richard Rowe
Rev. James E. Shepherd, II
Rev. Elizabeth S. Smith
St. Marks' UM Church Staff, Charleston
Stadelman/Oates Family
Julian Sirod Stadelman
Vernon & Sally Sloan
Jeff & Mary Taylor
Jack & Joyce Townsend
UM Foundation Staff
Dr. William H. Wilson
John C. Wright, Sr.



UNITED METHODIST FOUNDATION OF WV

2007 CONTRIBUTORS

Who are Contributors? The UM Foundation's definition of "Contributors" is: individuals, organizations, agencies and local churches who have given to existing trusts and/or custodial accounts or have established a new agreement benefiting local UM Churches and Conference-related ministries.

We wish to lift up the names of the many Contributors who gave in 2007 and say, *"Thank You for sharing God's blessings!"*

Albright UM Church, Albright
Rev. Timothy J. Allen
Anonymous (4)
Mrs. Helen Anderson
William H. Ayers

Dr. & Mrs. Arthur G. Backus
Dalynn T. Badenhop
Joseph Balbalian
Thomas & Geraldine Banketas
Mr. & Mrs. David A. Barnette
Sally A. Batz
Rev. D. Edward Bayer
Rev. Clyde W. Beard
Martha L. Bell
Joel & Gail Bennett
Rev. & Mrs. Martin A. Berisford, Jr.
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Rev. Gregory Lee Blair
Bland Street UM Church, Bluefield
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Barbara J. Boggs
Rev. John F. Bowyer
Rev. & Mrs. O. Richard Bowyer
G. Ross Boyce
Dr. Michael T. Bradfield
Mr. & Mrs. Robert M. Bragg
Christopher M. Bright
Mr. & Mrs. Edward J. Bright
Karen W. Brimhall
Broad Oaks UM Church, Clarksburg
Rev. & Mrs. Ronald R. Brooks
Mr. & Mrs. Robert E. Brown
Brenda & Jennings Browning
Bruce McDonald UM Church, Man
Burlington UM Family Services Auxiliary
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Christ UM Church, Parkersburg
Frances Gullett Coburn
Estate of Helen Coffindaffer
Elizabeth Collins
Annette & James Combs
Comet UM Church, Ravenswood
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Ruby Coppinger
Ruth A. Cosner
Ronald H. Craig
Vivian F. Crane
C. W. Crumb
Steven Cunningham

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Robert W. Davis
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Pamela G. Doyle
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Dr. Eileen G. Dumire
Wanda Dumire
Rev. & Mrs. Thomas E. Dunlap

E.P.S. Agent
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East Resources, Inc.
Ebenezer Outreach Center
Dr. & Mrs. Jack C. Eblin
Benjamin F. Elkins
Epworth UM Church, Ripley
Dr. & Mrs. E. Wendall Eskew
Dr. & Mrs. Vaughn M. Eskew
Extension Association of WV, Morgantown

Faesy & Bestholl, LLC, Stamford, CT
Fairview UM Church, Parkersburg
Faith UM Church, Huntington
Faith UM Church, Terra Alta
Karen Fenton
Michael & Bonnie Ferneau
Anne Ferrell
Rev. Ellen L. File
William H. File
Dorothy B. Finn

First UM Church, Elkins
First UM Church, Huntington
First UM Church, Ravenswood
First UM Church, Romney
First UM Church, Williamstown
Chad Floyd
Mary Beth Floyd
Forrest Burdette Memorial UM Church,
Hurricane
Pat Clinton Fragile
Franklin UM Church, Wellsburg
Sylvester Fretwell
Sara Fuqua
Jerry Furbee

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Frances B. Gommoll
Betty S. Gordon
Grace UM Church, Keyser
Dr. & Mrs. Edward L. Grant
Greater Kanawha Valley Foundation
Ann & Larry Green
Rev. Jerrie Green
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Bonnie D. Grisell
Bishop & Mrs. William Boyd Grove
Mr. & Mrs. David D. Groves
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GWP Foundation, Inc.

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Charles R. Hale
Charles D. Hambric
Hamilton, Burgess, Young & Pollard, PLLC,
Fayetteville
Steve Hamrick
Susan Harper
Allen L. Harrah
William E. Hastings
Reba Hayes



UNITED METHODIST FOUNDATION OF WV

2007 CONTRIBUTORS CONTINUED

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Dorothy & John Hrko
Mr. & Mrs. Richard H. Hudson
Richard & Jean Humphreys
A. J. Humphreys Foundation
Huntington Dental Society
Diana T. Hutchison
Jimmie & Mary Hutchison
Timothy Hylton

Edith S. Jack
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Robert L. Jackson
June James
Jane's UM Church, Keyser
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Dr. Patricia A. Jarvis
John Jenkins
Rev. & Mrs. Jonas Johnson, Jr.
Johnson Memorial UM Church, Huntington
Rev. & Mrs. Robert P. Johnson
Patricia C. Johnston
Mr. & Mrs. J. Brooks Jones
Jeniver Jones
Jimmie & Margot Justice

Mr. & Mrs. C. Dallas Kayser
Martha W. Kehoe
Janet Kemp
Kenova UM Church, Kenova
George P. Kirk
Howard E. & Mildred M. Kyle Foundation

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Opal V. Lantz
J. Syndey Larrick
Judith M. Lawrence
Gerald G. Leaseburge
Leggett Memorial UM Church, Biloxi, MS
C. Cameron Lewis
Lewisburg UM Church, Lewisburg
Margie Ann Linger
Rev. John W. Lipphardt
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J. Franklin Long
Gail and Larry Losch
Lubeck UM Church, Washington
Lumberport UM Church, Lumberport
Bishop & Mrs. Ernest S. Lyght

Marilyn Lynch
Mabel V. Mahood
Main Street UM Church, Petersburg
Dr. Thomas W. Malcom
Malden UM Church, Malden
Go-Mart, Inc.
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Steve & Kim Matthews
Rev. Donald S. Maxon
Walter S Mayo
Albert V. Mays
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David McKinney
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Gary McNair
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Karen & Ray Meyers
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Kathleen Mitchell
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Eugenia Moore
JP Morgan Investments
H. Donald & Carol J. Moss
Mount Juliet UM Church, Belle
Elizabeth Muldoon

William R. & Barbara Nestor
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Paradise UM Church, McHenry, MD
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Maxine W. Perdue
Benjamin A. & Sayaka Peters
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Scott & Carole Peters
Jeannie Plumley
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Prairie Chapel UM Church, Coshocton, OH
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Public Defender Corp. Tenth Judicial Circuit,
Raleigh Co.
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Rae C. Ramage Estate
James F. Ray
Mary Anne Reid
Rev. John Charles Riecks
Ronald N. Roberts
Rev. & Mrs. Robert B. Robey
Ida S. Robinson
M. Susan Rogers
Richard E. Rowe
Dr. Paul D. Russell

St. Andrew UM Church, St. Albans
St. John UM Church, Rand
St. John's UM Church, Spencer
St. Luke's UM Church, Craigsville
St. Mary's UM Church, Beckley
St. Matthew UM Church, Weston
St. Paul's UM Church, Oakland, MD
St. Paul's UM Church, Parkersburg
Milton H.R. Sadler
Virginia Scarlas
Rev. Margaret Roohan Schmitz
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Pauline W. Shaver
Jack M. Sink
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Mr. & Mrs. Scott G. Sink
Patricia & John Slack
Rev. & Mrs. Harold Slate
Rev. Elizabeth Shaver Smith
Naomi P. Snider
Myrtle Snopps Trust
Ted Soldan
Spring Heights Educational Center, Spencer
Rev. Paul M. Stadelman
Stephenson UM Church, Parkersburg
Rev. D. Homer Stewart
Rev. & Mrs. Edward J. Stout
Stout Memorial UM Church, Parkersburg
Strugglers Class, Epworth UM Church,
Ripley
Rev. James L. Sturm
Rev. H. Edgar Suite
Suncrest UM Church, Morgantown



UNITED METHODIST FOUNDATION OF WV 2007 CONTRIBUTORS CONTINUED

Mr. & Mrs. Floyd Taylor
Jeffrey A. & Mary C. Taylor
Brenda Thompson
Loudoun L. Thompson
Robert H. Thompson
Mr. & Mrs. Jack E. Townsend
Trinity UM Church, Fort Ashby
Trinity UM Church, Hamlin
Trinity UM Church, New Cumberland
Tyrone UM Church, Morgantown
Penelope Turley

UM Temple, Beckley
UM Temple, Shelly C. Dorman Sunday
School Class, Beckley
UM Women, First UM Church, Ravenswood
UM Women, Lubeck UM Church,
Parkersburg
Charles Urling

Edwin B. VanLynn
Mary Alice Vigneault
Vincent Memorial UM Church, Nutter Fort

Walden UM Church, Piedmont
Cecil I. Walker Machinery Company
W. Dale Walls
William J. Walter
Dr. Dale C. Waters
Richard & Linda Waybright
Loughrey F. Wegley
Mr. & Mrs. Jeffrey Welshonce
Wesley Chapel UM Church, Terra Alta
Wesley UM Church, Kingwood
Wesley UM Church, Morgantown
WV Conference Ministers' Mates
WV Conference Treasurer's Office
WV Council of Churches
Barbara White

Rev. Billy Reed Wickline
Betty L. Wigal
James R. Wigal
Rev. Robert C. Wilkins
John Wilson
Mr. & Mrs. Scott E. Wilson
Dorothy M. Wise
Barbara S. Woods
J. Thomas Woods
Sue D. Woods
Dr. Richard L. Wright
Wayne Wriston

David Yaussy
Virginia G. Young

Mary Ellen Zimmer

Recycled Cans, Scrap Metal, Lost Pennies and "Feed the Pig"



Rev. Jim Sturm has a special love for Crossroads Camp. Rev. Sturm served in the West Virginia Conference for several years and is currently serving at Leggett Memorial United Methodist Church in Biloxi, Mississippi. Leggett Memorial was hit very hard by Hurricane Katrina. It's congregation scattered over 9 states and it's building suffered major damage. In spite of the devastation in his local church and community, Jim continues to support Crossroads Camp with contributions to a fund established at the Foundation. Here is a letter that the Foundation recently received from Rev. Sturm:

"It is my privilege to enclose a check for \$40.00 to be deposited in the permanent endowment fund for the Crossroads Camp, of the Little Kanawha District. This represents recycled cans, scrap metal, lost pennies, and contributions to the "Feed the Pig" bank at our church. May our Lord continue to bless you, your family, your ministry, and all who encounter Jesus through the work of the Crossroads Camp."

The Foundation receives several letters like this one from Rev. Sturm a year. His gifts are illustrations of creative ways of finding funds to share even in the mist of hardship and that no gift is too large or too small.

Perhaps you and/or your church could find creative ways to establish a Fund or contribute to an existing Fund at the Foundation. Give it some thought. You may be pleasantly surprised.



UNITED METHODIST FOUNDATION OF WV FRIENDS OF THE FOUNDATION

This list represents the cumulative giving since 1992 to the General Endowment Fund and/or Discretionary Fund through 12/31/07. These funds provide support for the Foundation's annual operating expenses.

\$20,000 or more

Dr. Eileen G. Dumire
Mr. & Mrs. John D. Heater

\$15,000 or more

Rev. & Mrs. David R. Peters
Mrs. Pam Ream

\$10,000 or more

Mrs. Geraldine S. Banketas

\$7,000 or more

Mr. & Mrs. Herschel H. Rose, III
Mr. J. Scott Tharp

\$5,000 or more

Mr. John Jenkins
Mr. & Mrs. C. Dallas Kayser
Mr. & Mrs. John D. Lough
Mr. & Mrs. Kermit E. McGinnis

\$4,000 or more

Dr.* & Mrs. Claude R. Collins
Dr. & Mrs. Jack C. Eblin
Mr. & Mrs. Donald L. Hoylman
Mrs. Sylvia L. Lyon *
Ms. Susan E. Tate
Mr. & Mrs. William E. Watson
Mrs. Sylvia Wolfe
Mr. & Mrs. Luther E. Woods

\$3,000 or more

Mrs. Richard C. Brooke
Mrs. Betty S. Gordon
Bishop & Mrs. William Boyd Grove
Mr. Robert E. Haden
Mr. & Mrs. Frank A. Jackson
Mrs. Patricia C. Johnston
Mr. & Mrs. Richard E. Rowe
Mrs. Mary Alice Vigneault

\$2,000 or more

Mr. Harold G. Burke
Mr. & Mrs. Allen Carson
Dr. & Mrs. Ellis E. Conley
Dunn Family Foundation
Mrs. Helen Epps
Mrs. Peggy B. Hansbarger
Rev. Lewis J. Higginbotham
Mrs. Eleanor Houtt
Bishop & Mrs. S. Clifton Ives
Dr. & Mrs. J. Clair Jarvis
Mr. & Mrs. Larry Losch
Mr. & Mrs. James R. McCartney
Dr. & Mrs. Richard E. McClung
Mr. & Mrs. C. Okey McCormick
Rev. & Mrs. A. Lindsay Thorp
Dr. Donna H. Watson

\$1,000 or more

Dr. & Mrs. Arthur G. Backus
Mr. & Mrs. Jack C. Barr
Oscar & Dixie Bean
Mr. John N. Charnock, Jr.
Mr. & Mrs. Chester C. Dodd, Jr.
D. Lyn & Susan Dotson
Mr. Benjamin F. Elkins
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Dr. & Mrs. Edward L. Grant
Rev. & Mrs. Alvin L. Guyon
Colonel John Gwinn
Mr. & Mrs. David C. Hardesty, Jr.
Mr. Michael H. Hudnall
Rev. & Mrs. Jonas Johnson, Jr.
Mr. & Mrs. J. Brooks Jones
Mr. & Mrs. Charles C. Lanham
Mrs. Mabel V. Mahood
Mr. & Mrs. C. David McMunn
Mr. James V. Morris
Dr. & Mrs. Thomas Richardson
Mr. & Mrs.* William V. Rowan
Rev. Margaret Roohan Schmitz
Rev.* & Mrs. Douglas N. Shepherd
Rev. Elizabeth S. Smith
Mr. & Mrs. Loudoun L. Thompson
Mr. & Mrs. Robert H. Thompson

Honorable Cecil H. Underwood
Ms. Sue D. Woods

\$750 or more

Anonymous
Mr. & Mrs. Edwin L.D. Dils
Mr. & Mrs. David H. Groves
Mr. & Mrs. H. Donald Moss
Mr. & Mrs. Roger G. Roberts
Mr. Jeffrey A. Taylor
Mr. & Mrs. Scott E. Wilson
Mr. & Mrs. J. Thomas Woods

\$500 or more

Mr. G. Ross Boyce
Brenda & Jennings Browning
Mrs. Phyllis H. Carter
Dr. & Mrs. D. Keith Clarke
Mr. F. Fenton Cummings
Dr. & Mrs. Basil A. Hensley
Russell L. Issacs & Jill Wilson
Ms. Katherine G. Johnson
Miss Opal Lantz
Mr. & Mrs. J. Franklin Long
Rev. & Mrs. Ronald M. McCauley
Mr. Kenton Meadows
Miss Kathleen Mitchell
Miss Wanda B. Mitchell
Mrs. & Mrs. W. R. "Bob" Nestor
Mr. & Mrs. F. B. Nutter, Sr.
Mr. & Mrs. Brandley R. Oldaker
Rev. Peggy R. Petrich
Mr. James F. Ray
Mr. Ronald N. Roberts
Rev. & Mrs. Robert B. Robey
Mrs. Jeanne K. Ross
Ms. Sally M. Sanders
Dr. & Mrs. Samuel B. Sink
Mrs. Naomi P. Snider
Mr. & Mrs. Jack V. Stephens
Mr. & Mrs. C. Robert Sullivan
Mrs. Martha Jane Ware
Bishop D. Frederick Wertz
Dr. & Mrs. Richard L. Wright
Mrs. Virginia G. Young

* Deceased in 2007



UNITED METHODIST FOUNDATION OF WV FRIENDS OF THE FOUNDATION CONTINUED



Resurrection Cross
St. Marks UMC, Charleston

\$250 or more

Mr. & Mrs. Emory W. Ballengee
Miss Martha Bell
Mrs. Patricia M. Bennett
Rev. & Mrs. Martin A. Berisford
Mr. & Mrs. Doran Bleigh
Mr. & Mrs. Ernest R. Bowling, Sr.
Rev. & Mrs. L. Norman Butler
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Mr. & Mrs. Louis Coulling, Jr.
Ms. Vivian Crane
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Dr. Ross M. Evans
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Mr. & Mrs. Michael Ferneau
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Ms. Virginia J. Hopkins
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Rev. David E. Jasper
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Mr. & Mrs. J. Syndey Larrick
Mr. Barry L. Locke
Ms. Marilyn Lynch
Mr. & Mrs. Gary McNair
Ms. Ruth J. Mollohan
Mr. & Mrs. Wesley Nickell
Mrs. Geraldine F. Roach
Dr. & Mrs. Harry Shannon
Rev. Paul M. Stadelman
Mrs. E. Joyce Townsend
Rev. & Mrs. Roger L. Waybright
Rev. & Mrs. Billy Reed Wickline

\$100 or more

Anonymous
Mrs. Helen Anderson
Ms. M. Joyce Anderson
Mr. Raymond W. Barr
Mr. John W. Blagg
Ms. Geneva Blair
Mr. & Mrs. Lawrence Blush
Mr. & Mrs. Howard Boggs
James & Barbara Boggs
Mr. Frederick R. Brooking
Rev. & Mrs. Ronald R. Brooks
Mr. Timothy A.R. Callahan
Karen & David Cartwright
Mr. & Mrs. Joseph R. Cheurvont
Frances Gullett Coburn
Dr. I. Mark Conner
Mrs. Ruby A. Coppinger
Mrs. Ruth Corder
Mr. & Mrs. R. Scott Criss
Mr. Benjamin F. Crutchfield, Jr.
Mr. & Mrs. David B. Dalzell, Jr.
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Rev. & Mrs. Thomas E. Dunlap, Sr.
Rev. & Mrs. Charles A. Ellwood
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Mrs. Dorothy B. Finn
Mr. Jerry Furbee
Dr. & Mrs. Joseph N. Geiger
Mrs. Frances B. Gommoll
Rev. & Mrs. George H. Gray
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Mr. Ira M. Haught
Mrs. Melva C. Hess
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Mr. Bruce Holmes
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Rev. & Mrs. Harold Slate
Mrs. Ruth Temple
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Dr. & Mrs. Dale C. Waters
Mr. & Mrs. Richard Waybright
Mr. George Webb
Betty & Larry Wigal
Rev. & Mrs. Robert C. Wilkins
Mr. & Mrs. Wayne Wriston
Mr. & Mrs. David Yaussy

*You will be glorifying God
through your generous gifts.
For your generosity to them
will prove that you are
obedient to the Good News
of Christ.*

2 Corinthians 9:13

* Deceased in 2007



UNITED METHODIST FOUNDATION OF WV TRUSTS ESTABLISHED IN 2007

Trusts provide ongoing support to a church, agency, or ministry designated by the donor. Beneficiaries of these trusts are noted in italics.

Ten new Trusts established totaling \$152,109.39

Anonymous Trust

Financial resource for Concord UM Church, Athens

David Coffindaffer Memorial Scholarship

Scholarships for needy students of WV Wesleyan College

Rev. Dr. Claude R. Collins Memorial Trust

Support the ministry of the UM Foundation of WV, Inc.

Dental Auxiliary Fund

Financial resource for dentistry at the Ebenezer Medical outreach program in Huntington

Patricia Kent Johnston Honorary Trust

Financial resource for UM Temple, Beckley

Horace G. Mitchell & Virginia "Tots" Hale Memorial Scholarship Fund

Educational needs of UM persons from the WV Conference enrolled in and attending seminary

Parish Nurse Fund

Financial resource for a parish nurse ministry of Wesley UM Church, Kingwood

Suncrest UM Church Youth Trust Fund

Financial resource for variety of youth ministry of Suncrest UMC, Morgantown

J. Scott & Mary Jo Tharp Memorial Trust

Financial resources for Barrackville UM Church, Barrackville

Alberta J. Wegley Memorial Trust

Financial resource for the adoption services of Burlington UM Family Services

Two Trusts established by Gift Annuity Remainders

Roy R. & Sylvia M. Cox Memorial Trust

Financial resource for St. Paul UM Church, S. Charleston

Roy R. & Sylvia M. Cox Memorial Trust Fund

Seminary scholarships for member(s) of the WV Annual Conference

20 Years Later

May 1988 a Trust was established that made available monies to help clergy serving in Nicholas and Webster Counties in time of a financial crisis identified by the District Superintendent. The Foundation received the following letter from a recent recipient of this Trust.

"I can't begin to express what your gift from the Trust at the UM Foundation means to me and my family. The money is most definitely helpful and will go to extremely good use, there's no doubt about that. But more than the monetary value, I so greatly appreciate the thought behind the gift. Illness is a burden but your actions have really lightened the load. For that especially, I thank you.

This time has been difficult for us, but knowing we have the support of people like you certainly helps. Please know I won't forget your kind gesture. Thank you again from the bottom of my heart."

These words indicate how individuals sharing God's blessings 20 years ago have lightened a burden of someone today. Think about it.

There are numerous ways to become a good financial steward of what God has given us. The UM Foundation welcomes the opportunity to introduce ways of finding and sharing God's blessings. Contact the UM Foundation at 800-788-3746 ext. 45 or e-mail us at info@umfwv.org or visit our website at www.umfwv.org



UNITED METHODIST FOUNDATION OF WV CUSTODIAL ACCOUNTS ESTABLISHED IN 2007

Custodial Accounts (deposit accounts) are a convenient way for a Church or agency to place money with the UM Foundation for investment. The advantages of a Custodial/Deposit account are:

- deposits and withdrawals at any time in any amount including income and principal
- no maturity dates
- no penalty for withdrawals

Purpose or beneficiary of the accounts are noted in italics.

James Brimhall Memorial Mission Scholarship Fund
St. Andrew UM Church, St. Albans

Brinkley Agape Fund
Lumberport UM Church, Lumberport

Ebenezer Community Outreach Investment Fund
Huntington

J. A. Gist Memorial Education Fund
Franklin UM Church, Wellsburg

Susan Haggerty Scholarship Fund
Trinity UM Church, Fort Ashby

Jane's UM Church Reserve Fund, Keyser

Mill Creek UM Church Reserve Fund

St. Paul's UM Church General Reserve Fund,
Oakland, MD

James Shobe Fund
Main Street UM Church, Petersburg

United Methodist Women Reserve Fund
First UM Church, Ravenswood

WV Council of Churches Reserve Fund
Commission of Religion in Appalachia (CORA)

Eleven new Custodial Accounts established totaling \$224,529

**Do "good works"
because you want to
share God with others.**

**Contact the Foundation
to see how we can assist
with your Church's
"good works".**

**UM Foundation of WV
800-788-3746 ext. 45
info@umfww.org
www.umfww.org**



The Wesley House is a campus ministry to the community of Fairmont State University. It was a recent recipient of funds from a Trust established at the Foundation. Here is an excerpt from a letter to the Foundation by Rev. Michael Paul Waide, Executive Director and Campus Pastor.

"Your generous and gracious gift allows us to continually reach out to the students of Fairmont State and offer them a 'home away from home.' On behalf of the 200 students, faculty and staff who gather weekly at the Wesley House, I thank you for your unexpected (but timely) and generous gift to the Wesley (Foundation) House at Fairmont State."

These words serve as a testimony of "good works" and the sharing of God's blessings with others.



UNITED METHODIST FOUNDATION OF WV GIFT ANNUITIES ESTABLISHED IN 2007

Five new Gift Annuities established

Ronald H. Craig Gift Annuity (1)

Lucille R. Gainer Gift Annuity (1)

Allen L. Harrah Gift Annuity (1)

Kathleen Mitchell Gift Annuity (5)

Wanda B. Mitchell Gift Annuity (7)

Number indicates total number of gift annuities
now established by the individual(s)

GIFT ANNUITIES are a wonderful way to make meaningful gifts while enjoying income and tax benefits that can also help enhance your future financial well-being. The remainder of the gift benefits a United Methodist local church or Conference-related ministry designated by the donor.



"It is like a grain of mustard seed which a man took and sowed in his garden; and it grew and became a tree, and the birds of the air made nests in its branches."

Luke 13:19

Establishing an income gift (Gift Annuity/ Unitrust) is like sowing a grain of mustard seed. It will assist in providing for your needs and will continue, after your lifetime, to provide for needs of others per your designation.

Consider planting your mustard seed by creating an income gift. Think about the many ways you can leave a legacy and share God's blessing.

Gift Annuity Rates				
Here is a sampling of current rates and benefits for a gift annuity created with \$10,000:				
Age	Payout Rate	Annual Income	Tax-free Portion	Charitable Deduction
65	6.0%	\$600	\$318	\$3,656
70	6.5%	\$650	\$375	\$4,036
75	7.1%	\$710	\$444	\$4,498
80	8.0%	\$800	\$536	\$4,955
85	9.5%	\$950	\$681	\$5,293
90	11.3%	\$1,130	\$866	\$5,754

CREATE YOUR OWN CHARITABLE GIFT ANNUITY ...

... a gift that gives back now and later

You can:

- Endow your local church or favorite ministry
- Receive fixed income for one/two lives, part of which is tax-free
- Claim an income tax deduction in the year of your gift

Contact the UM Foundation at:

800-788-3746 ext 45
Email: info@umfww.org
On-line: www.umfww.org



UNITED METHODIST FOUNDATION OF WV BENEFICIARIES OF TRUSTS AND ACCOUNTS

Greenbrier District Local Churches

Bascom UMC, Durbin UMC, Emmanuel UMC,
Fenwick UMC, First UMC-Hinton,
First UMC-Lewisburg, First UMC-Ranielle,
First UMC-Webster Springs,
Highland Park UMC, Jordan Chapel UMC,
Lewisburg UMC, Memorial UMC,
Mt. Zion UMC-Hico, Mt. Zion UMC-Nettie,
Rainelle UMC, St. Luke UMC, St. Paul's UMC,
Union UMC

Midland South District Local Churches

Aldersgate UMC, Asbury UMC, Brown UMC,
Bruce McDonald Memorial UMC, Buffalo UMC,
Central UMC, Chelyan UMC, Christ UMC,
Clendenin UMC, Coal Fork UMC,
Cross Lanes UMC, Dunbar UMC,
East Bank UMC, Elizabeth Memorial UMC,
First UMC-South Charleston,
Forrest Burdette Memorial UMC,
Greenlee UMC, Mt. Juliet UMC,
Mt. Tabor UMC, Madison UMC,
Nighbert Memorial UMC, Riverview UMC,
St. Andrew UMC, St. Marks UMC,
St. Paul UMC, Simpson Memorial UMC,
Trinity UMC, Wesley UMC, West Side UMC,
Winfield UMC

Little Kanawha District Local Churches

Bethany UMC, Christ UMC-Parkersburg,
Elizabeth UMC, Emmanuel UMC,
Epworth UMC, Fairview UMC,
First UMC-Parkersburg, First UMC-Ravenswood,
First UMC-Williamstown, Lubeck UMC,
Parkview UMC, Pleasant Hill UMC,
Rosemar UMC, St. Andrew's UMC,
St. John UMC, St. John's UMC, St. Luke's UMC,
St. Marys UMC, St. Paul's UMC,
Seventh Street UMC, Smithburg UMC,
Smithville UMC, Stephenson Memorial UMC,
Stout Memorial UMC, Trinity UMC,
Wayside UMC

Mon Valley District Local Churches

Barrackville UMC, Blueville UMC,
Boothsville UMC, Central UMC,
Church of the Good Shepherd,
Crim Memorial UMC, Enterprise UMC,
Faith UMC, Gateway UMC,
Highland Avenue UMC, Lambert's Run UMC,
Lumberport UMC, Masontown UMC,
Pruntytown UMC, Reedsville UMC,
Spruce Street UMC, Suncrest UMC,
Tyrone UMC, Walnut Grove UMC,
Warren UMC, Wesley UMC, Westover UMC

Northern District Local Churches

Christ UMC, First UMC, Follansbee UMC,
Franklin UMC, Glen Dale UMC,
New Martinsville UMC, Pleasant Valley UMC,
Point Pleasant UMC, Short Creek UMC,
Simpson UMC-Moundsville,
Simpson UMC-Wheeling, Thomson UMC,
Trinity UMC, Warwood UMC, Wellsburg UMC

Potomac Highlands District Local Churches

Bass UMC, Bethel UMC, Calvary UMC,
Cornith UMC, Deep Creek UM Ministries,
Duffey Memorial UMC, First UMC-Parsons,
First UMC, Romney, First UMC-Terra Alta,
Flanagan Hill UMC, Fout Memorial UMC,
Grace UMC, Jane's UMC, Jennings UMC,
Kingwood Parish, Main Street UMC,
North River Mills UMC,
St. Paul's UMC-Oakland,
St. Paul's UMC-Ridgeley,
Trinity UMC-Fort Ashby,
Trinity UMC-Piedmont, Wardensville UMC,
Wesley Chapel UMC



UNITED METHODIST FOUNDATION OF WV BENEFICIARIES OF TRUSTS AND ACCOUNTS

Southern District Local Churches

Bland Street UMC, Bluewell UMC,
Brushfork UMC, Concord UMC,
Fayetteville UMC, First UMC-Beckley,
First UMC-Iaeger, Gary UMC,
John Stewart UMC, Mt. Hope UMC,
Mt. Horeb UMC, Matheny UMC, Oak Hill UMC,
Pinnacle Cooperative Parish,
Rebecca Chapel UMC, St. Mary's UMC,
Trinity UMC, UM Temple

Western District Local Churches

Bachtel UMC, Beech Hill UMC,
Beverly Hills UMC, Central UMC, Faith UMC,
First UMC-Barboursville,
First UMC-Huntington, Fourth Avenue UMC,
Heights UMC, Highlawn UMC,
Johnson Memorial UMC, Kenova UMC,
Lavalette UMC, Matewan UMC,
New Haven UMC, Riverview UMC,
Steele Memorial UMC, Trinity UMC-Hamlin,
Trinity UMC-Point Pleasant, Wayne UMC,
West Hamlin UMC

Wesleyan District Local Churches

Beverly UMC, Bridgeport UMC,
Broad Oaks UMC, Burnsville UMC,
Chapel Hill UMC, Christ UMC, Copen UMC,
Duff Street UMC, First UMC-Buckhannon,
First UMC-Clarksburg, First UMC-Elkins,
First UMC-Gassaway, Hammond UMC,
Indian Camp UMC, Lost Creek UMC,
Mill Creek UMC, North Elkins UM Charge,
North View UMC, Otterbein UMC,
St. Matthew UMC, Salem UMC,
Smith Chapel UMC, Stealey UMC, Trinity UMC,
UM Temple, Vincent Memorial UMC,
Wayside UMC, Woodford Memorial UMC

Conference Affiliated Agencies, District Offices, Institutions & Special Ministries

Board of Global Ministries, Board of Higher Education & Campus Ministry, Burlington UM Family Services, Inc.,
Commission on Archives & History, Commission on Conference Camps & Educational Center,
Community Development Outreach Ministries, Conference Board of Trustees, Council of Finance & Administration,
Covenant Council, Crossroads Camp, Ebenezer Community Outreach Center, Episcopal Office, Ethnic Ministries,
GlenWood Park, Greenbrier District, Health & Welfare Ministries, Heart and Hand House-Philippi, House of the Carpenter,
Little Kanawha District, McDowell Mission, Midland South District, Mon Valley District, New Church Development,
Northern District, Pension Funds, Inc., Potomac Highlands District, Scott's Run Settlement House, Southern District,
Spring Heights Education Center, Tyrand Cooperative Ministries, Inc., WV Hunger, UM Foundation of WV, Inc.,
UM Layman's Foundation, Upshur Cooperative Parish, Inc., Volunteers In Mission,
Wesley Foundations (Fairmont State, & Marshall Campus Ministries), Wesleyan District, Western District,
WV Wesleyan College

Other Ministries

Africa University, Asbury Theological Seminary, Duke Divinity School,
Methodist Theological School of Ohio, UMCOR World Hunger,
UM Churches Outside of the WV Conference,
United Theological Seminary, Wesley Theological Seminary,
WV Council of Churches





United Methodist Foundation of WV

BOARD OF TRUSTEES

Bishop Ernest S. Lyght 2
Charleston

Ronald N. Roberts, Chairperson 2, 4, 6
Parkersburg

Judy S. Eblin, Secretary 2, 4, 5
Huntington

Rev. David R. Peters, President 2, 4
Hurricane

Patricia C. Johnston, Vice Chairperson 2, 4C, 5
Beckley

C. Dallas Kayser, Treasurer 2, 3, 4
Point Pleasant

Geraldine S. Banketas (3)
Weirton

Brenda A. Browning (5)
Huntington

Karen S. Cartwright (6)
Buckhannon

John N. Charnock, Jr. (3)
Charleston

Vivian F. Crane (1)
Rupert

Hugh P. Dopson (1)
Terra Alta

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Dr. Joseph N. Geiger (1C, 2)
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Sidney E. Grisell (1)
Glen Dale

Robert E. Haden (3)
Morgantown

Rev. Charles E. Hicks (3)
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Virginia Jackson Hopkins (1, 4)
Morgantown

Rev. J. F. Lacaria (5)
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Oakland, MD

Royce A. Lyden (6)
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Rev. Ronald M. McCauley (2, 4, 5C)
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Bluefield

Gary McNair (5)
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William Robert Nestor (2, 6C)
Williamstown

Wesley Nickell (3)
Wheeling

Delbert L. Phillips (2, 3C)
Fairmont

Dee Rumbaugh (1)
Charleston

Betty L. Wigal (6)
Parkersburg

Committee affiliation key:

- 1 Church Relations Committee
- 2 Executive Committee
- 3 Investment Committee
- 4 Personnel Committee
- 5 Resource Development Committee
- 6 Trustee Committee
- C Committee Chair

STAFF

David R. Peters
President

Jeffrey A. Taylor
Associate Director

E. Joyce Townsend
Accounts Administrator

Sally A. Sloan
Administrative Assistant

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President's Review

I was serving my third ministerial appointment in 1974 when the Annual Conference session voted to establish the then “United Methodist Charities of West Virginia, Inc.” I remember that the discussion and decision to do so was not without controversy. Would this Foundation take away from the fulfillment of the apportionments, would it compete for our parishioners’ dollars, just how feasible would this venture be, etc.?

Little did I know back then that my sixth ministerial appointment in 1991 would be as director of the Foundation.

Now it is seventeen years later and there have been many changes including a name change to the United Methodist Foundation of West Virginia, Inc. in 1995. For twenty years the name “Charities” conveyed the object of our ministry and of our efforts were the ministries of the Church – the local church and the conference-affiliated agencies, institutions, mission projects and special ministries. In 1991 the Foundation managed assets totaling \$5.5 million ... today there are assets in excess of \$50 million.

The mission of the Foundation has not changed over these past thirty-four years! The Foundation is still raising, managing, and distributing funds for the benefit of United Methodist causes!

I have been blessed by the experience of being with this ministry for half of its life. I’ve been blessed by the hundreds of friendships and the acquaintances I have made through the Foundation (some of whom even became donors); by the members of the Board of Trustees who have served over those years; by those individuals that served as chairpersons of the Board of Trustees; by the staff that daily dedicated themselves to this ministry; and by supportive pastors and the leadership given to the Foundation by all our Bishops!

It has been a joy and blessing to serve my Lord and the Church in this ministry. Thank you one and all for your support of the Foundation and me.

The UM Foundation’s ministry will be in very capable hands in the person of Jeffrey A. Taylor. Jeff has served in every imaginable capacity with the Foundation over the last five years. He has done it all. He cares about the Lord’s work and the Church as much as I do, and his presence at the Foundation permits me to retire “from the active ministry” with confidence about the Foundation’s future. The total staff and current members of the Board of Trustees are the right people at the right time. The Foundation’s ministry will continue to strengthen and impact all of the Conference and all the Church.

May God continue to bless the UM Foundation’s ministry to all the vital missions and ministries of the Lord around the West Virginia Conference and the United Methodist Church!

Rev. David R. Peters
President



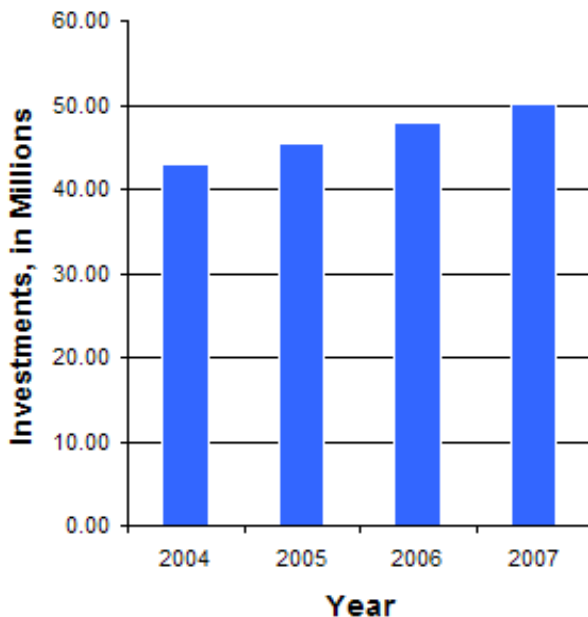
UNITED METHODIST FOUNDATION OF WV 2007 PRESIDENT'S FINANCIAL REPORT

At the United Methodist Foundation of West Virginia, we take our fiduciary duty to properly protect and manage the assets of your Foundation very seriously. Presented here are the preliminary, unaudited results as of December 31, 2007, and for the year then ended.

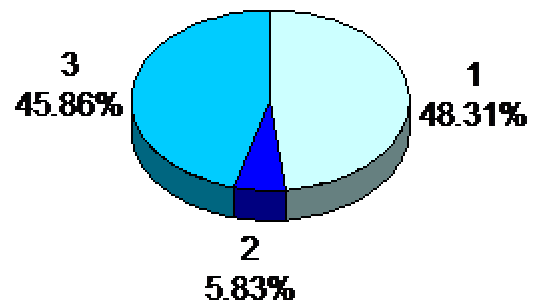
Financial Highlights

	2004	2005	2006	2007
Total Investment Funds Market Value (<i>millions</i>)	\$ 43.00	\$ 45.34	\$ 47.90	\$ 50.22
Total Market Value of All Assets (<i>millions</i>)	\$ 43.10	\$ 45.49	\$ 48.05	\$ 50.50
New Gifts, Income Gifts, and Custodial Accounts, and additions to all funds (<i>millions</i>)	\$ 3.90	\$ 2.80	\$ 2.20	\$ 2.25
Total Administrative Expenses (<i>millions</i>)	\$ 0.35	\$ 0.37	\$ 0.40	\$ 0.43
Number of:				
Trust Funds	479	491	504	446
Custodial Accounts	178	214	225	304
Income Gifts	74	81	88	86
TOTAL	731	786	817	836

Total Investment Funds - By Year



How Our Assets Are Designated at 12/31/07



Item - Description	Amount (millions)	Percent
1 - Trust Funds	\$24.26	48.31%
2 - Income Gifts	\$2.93	5.83%
3 - Custodial Accounts	\$23.03	45.86%



UNITED METHODIST FOUNDATION OF WV 2007 PRESIDENT'S FINANCIAL REPORT CONTINUED

Investment Advisors and Managers, and Performance of Funds

Investment Advisors:

MonroeVos of Houston, TX and Birmingham, AL

Custodian Bank:

The Bank of New York/Mellon

Investment Managers:

PIMCO Low Duration III and Total Return III Funds (fixed income)
 Santa Barbara (large cap growth)
 NWQ Investment Management Co. (large cap value)
 NWQ Investment International Equity ADR (international equity)
 Renaissance Investment (small cap growth)
 Private Capital Management (small cap value)
 PIMCO Emerging (emerging market debt)
 PIMCO Commodity (managed commodity)
 Vanguard Energy Fund (natural resource / energy)
 Phoenix-Duff Real Estate (real estate)

Investment Yields (minus all fees) for 2005 - 2007 were:

		Income Yield	Capital Change	Total Return
Fund A	(Income)	3.87%	-1.39%	2.48%
Fund B1	(Income/Growth)	3.17%	2.20%	5.37%
Fund B2	(Balanced)	2.44%	3.35%	5.79%
Fund B3	(Growth/Income)	1.98%	3.35%	5.33%

Our Audit

The Board of Trustees of the United Methodist Foundation has engaged the firm of Gibbons & Kawash, CPAs, to perform the annual audit of the Foundation's books and records. The 2007 audit will occur in May and June of 2008. Copies may be obtained thereafter from the Foundation's office or directly from our CPA firm. The audit is available in both paper and electronic format.

Foundation Offices

Rev. David R. Peters, President
 Joyce Townsend, Accounts Administrator
 Phone (304) 342-2113
 C. Dallas Kayser, Treasurer
 Phone (304) 675-5440

Independent CPA Firm

Gibbons & Kawash, CPAs
 Valerie R. Ellis, CPA, Partner
 707 Virginia Street, East
 Charleston, WV 25301
 Phone (304) 345-8400



Our Mission

With Jesus' help, let us continually offer our sacrifice of praise to God by proclaiming the glory of his name. Don't forget to do good and to share what you have with those in need, for such sacrifices are very pleasing to God.

Hebrews 13: 15-16

New Living Translation

Money, material possessions, property and all the things money can do are blessings from God. As disciples we learn how to use and share all God given blessings and resources. This includes financial resources.

There are a number of ways individuals and congregations have available to them in sharing God's blessings. Here are some examples:

- ✝ Bequests
- ✝ Charitable Gift Annuity (a gift that pays an income)
- ✝ Donor-Advised Funds
- ✝ Establishing a Custodial (deposit) Account
- ✝ Giving Securities or other appreciated assets
- ✝ IRA beneficiary designations
- ✝ Lead Trusts
- ✝ Life Insurance
- ✝ Retirement Plan beneficiary designations
- ✝ Giving Real Estate

Sharing God's blessings makes us good stewards of what has been given to us and is a reflection of trust, commitment and love.

The UM Foundation is at your service and is your strong ally as you contemplate the impact you will make and the influence you will have through your Christian stewardship and sharing your blessings. Contact the UM Foundation office at 1-800-788-3746 ext. 45 and discover a variety of stewardship options available to you and your local church.

Our Mission

To Serve

United Methodist individuals, families, local churches, and Conference-related ministries

By raising, managing and distributing funds

for the benefit of United Methodist causes.

Sharing God's Blessings





West Virginia
Southeastern Ohio, Eastern Kentucky
and neighboring communities

Make a Difference in the Lives That Follow

Take a moment to Leave Your Legacy

You support your local church and other Conference ministries through your tithes and offerings, making annual gifts, attending events, and volunteering your time. By doing so, you are making a difference.

But what happens to your support of Christ's work when you are gone?

Consider leaving a legacy through your will or trust, life insurance policy, or retirement plan. You may want to talk with your professional advisor about the best ways to leave your legacy. It could be a percentage of your estate or 401(k) plan, or a specific dollar amount. No amount is too small. Your gift, no matter the size, will ensure that the health and strength of the church will be sustained, allowing it to continue making disciples of Christ and serving future generations.

The United Methodist Foundation of WV, Inc. is a founding partner with a local initiative called the LEAVE A LEGACY® *Greater West Virginia Program* that is designed to encourage bequests or planned giving by people from all walks of life.

David Peters and Jeff Taylor are ready to discuss your legacy gift and answer any questions that you may have. You can also find more information at www.lalwv.org or www.umfwv.org

You can LEAVE A LEGACY

Make a Difference in the Lives That Follow

Contact Information

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PO Box 3811
Charleston, WV 25338-3811
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E-mail: info@umfwv.org
Website: www.umfwv.org

On-line Giving is available on our website.