



## A Legacy of Service

Although Marilyn and Tom Holleron have both died, their legacy lives on in the form of a scholarship created by their daughters and contributed to by their many friends. The Hollerons were faithful members of Johnson Memorial United Methodist Church in Huntington and dedicated themselves to a variety of volunteer efforts that included their church, but went beyond the local church as well. Tom and Marilyn set an example of altruism – promoting goodness and improving the lives of others – through their many acts of volunteering throughout their lives. Their daughters, Lorri Stepp and Jeanne Elam, agreed that the best way to honor their parents’ memories would be a scholarship that recognizes the self-sacrificing efforts of young people. “Having a memorial scholarship that will be given to an individual or individuals who can understand the selflessness of giving to others through volunteering is a way we wish to honor our parents’ memory... so that their legacy of volunteering will be promoted and encouraged in others.”

The annual net income from the Tom and Marilyn Holleron Volunteer Service Scholarship Trust is distributed to a committee at Johnson Memorial to be used for a post-secondary education scholarship awarded to someone from the Huntington tri-state area who is an active volunteer, and who demonstrates in writing the importance of volunteerism and the effect it has on her/his own life as well as the lives of others.



Education and volunteer efforts are two characteristics upon which Tom and Marilyn placed high value. Through this scholarship, their values continue to influence young people, not only at their Church, but beyond the Church’s walls and into the community they served. Although Tom and Marilyn Holleron have died, the students who receive the scholarship will know their encouragement and support; in that sense, it offers evidence of eternal life!

What is your legacy of generosity? Contact The Foundation to consider the possibilities. ☺

## Inside this Issue

	<u>Page</u>
<i>A Legacy of Service</i>	1
<i>Foundation Ministry Grants</i>	2
<i>Grant Guidelines</i>	2
<i>Bequest Language</i>	3
<i>Focus on Legacy Gifts</i>	4
<i>New Officers and Trustees</i>	5
<i>Investment Performance</i>	5
<i>Our Mission: To Serve</i>	6

Visit us on the Web  
[www.umfwv.org](http://www.umfwv.org)



Like us on Facebook at  
[www.facebook.com/umfwv](http://www.facebook.com/umfwv)

Or call us toll free  
1-800-788-3746 ext. 45

# Foundation Ministry Grants

One of the ways The Foundation serves God and the people, churches, and ministries of the West Virginia Annual Conference is by providing grants for ministry. We tithe our annual revenues to provide grants that help to initiate ministry that is innovative, new or acutely needed, especially ministry that has the capacity to enrich many or all local church ministries.

Our most recent grant was to fund the Bishop's Dinner for Scouting. The event was held at Summit Bechtel Reserve, and its goal was to bring together leadership from local churches to encourage them to initiate or grow Scouting ministries to the children and youth in their communities.



Bill Atwell, a member of the Planning Committee and Past President of the Conference United Methodist Men, wrote in a letter to The Foundation following the event, "Thank you very much for making the Bishop's Dinner for Scouting possible through the generous grant you provided.... The Bishop encouraged churches to become chartering organizations for scouting with the message that 'Scouting is ministry.' That message was received by those attending the dinner made possible by you."

Have you considered the possibilities of how a Foundation grant could enhance or expand ministry? To apply for a grant, write a letter to The Foundation that outlines your request, including how it meets the guidelines published below, the amount requested and your contact information. ↻

*Gratitude is expressed to the Annual Conferences Communications staff for the images on this page.*

## Grant Guidelines

The Foundation Grants Committee shall consider and make recommendations to the Board of Trustees regarding grants according to the following guidelines:

- In general, Foundation grants are not intended to provide sustaining support or to fund the existing regular operational obligations of a church or agency. Rather, Foundation grants are primarily intended to help initiate programs, projects or activities – especially those that are innovative, new or acutely needed. Our priority is to fund activities in the conference that have the capacity of enriching many or all local churches' ministries.
- We will avoid becoming the perpetual funder for any ongoing program or ministry.
- We target our resources primarily to United Methodist programs and ministries of the West Virginia Annual Conference.
- We want to be targeted and strategic in our grant-making, preferring to make fewer substantial commitments, rather than diluting our impact by spreading our resources thinly over many small requests.
- We conscientiously attempt to communicate with conference leadership to better understand the Conference's needs and opportunities.

# Bequest Language

When you decide to leave a bequest for ministry through The Foundation, bequest language can be a useful tool to share with your advisors as they help you prepare your will and estate plans.

## ***A. Cash Gift to the United Methodist Foundation of West Virginia, Inc.***

I give and bequeath to the United Methodist Foundation of West Virginia, Inc., a not-for-profit charitable corporation of Charleston, West Virginia, (tax i.d. # 55-0545643) the sum of \_\_\_\_\_ (\$\_\_\_\_\_) to be used as the Board of Trustees of said foundation shall determine.

## ***B. Cash Gift to the United Methodist Foundation of West Virginia, Inc. to establish an Endowment Fund***

I give and bequeath to the United Methodist Foundation of West Virginia, Inc., a not-for-profit charitable corporation of Charleston, West Virginia, (tax i.d. # 55-0545643) the sum of \_\_\_\_\_ (\$\_\_\_\_\_) in trust, to be held, invested and managed by said foundation as trustee for the benefit of the principal of which shall be used to establish the \_\_\_\_\_ Memorial Fund for ABC United Methodist Church, of \_\_\_\_\_ West Virginia, with the annual net income to be distributed to such church, to be applied for a constructive purpose, as the proper officials of such church from time to time shall establish. Such gift shall continue to be held in trust so long as such church shall continue to exist as a United Methodist Church (or successor), but if such church shall cease to exist or cease to be affiliated with the United Methodist Church (or successor), then the annual net income shall be distributed to a United Methodist Church in the same geographical area providing a similar ministry as determined by the trustee.

## ***C. Gift of Residuary Estate to the United Methodist Foundation of West Virginia, Inc.***

I give and bequeath the rest, residue, and remainder of my estate, whether real, personal or mixed, to the United Methodist Foundation of West Virginia, Inc. (see either A or B above)...

## ***E. Contingent Gift to the United Methodist Foundation of West Virginia, Inc.***

In the event my spouse shall not survive me by thirty (30) days, I give and bequeath to the United Methodist Foundation of West Virginia, Inc., of Charleston, West Virginia, (the sum of \_\_\_\_\_ or the rest, residue, and remainder) (see either A or B above). ☪

## Foundation Officers and Board Members

Jeffrey A. Porter  
*Chairperson*

Bishop Sandra L. Steiner Ball  
*Honorary Chairperson*

David B. Ellwood  
*Vice-Chairperson*

Jeffrey A. Taylor  
*President*

William B. Goode  
*Treasurer*

Anne B. Charnock

James A. Chaney

Mark B. Chernenko

Ellis E. Conley

D. Lyn Dotson

Ronald D. Eaton

Stephen Foster

Lauren A. Godwin

Karen K. Grafton

Russell R. Haynes

Joseph B. A. Hill

Rebecca J. Keeling

Scarlett E. Kellerman

Suzanne Knight

J. Franklin Long

James R. Malick

Martha M. Nepa

Bruce N. Petersen

Richard H. Sale

Deborah Shaffer

Ken K. Shanes

Edward A. Sisson

Richard N. Toothman

Earnest Watkins

George Webb

Vernon Webster

Jeffrey C. Welschonce

# Focus on...

## Leave a Legacy: Gifts from Your Estate

### *Do you have a will?*

Although most people know the importance of having a will, statistically, most adults do not have a will. Unless you have a valid will or trust, your wishes cannot be honored as to how your estate will be distributed, who will handle your affairs, or who would serve as guardian for any minor children you have. Without a will, you would leave those important decisions to the courts.

### *Your testament to your faith.*

Your will is not only a legal instrument, but also can serve as a testament to your Christian faith. In your will, you can witness to your faith in actions and words. You can create a lasting and transformational gift to your church or some other ministry.

### *Why make a gift from your will?*

- It is often the easiest way to give the largest gift.
- It is revocable. You can always change your mind as your circumstances change.
- It is flexible, allowing you to provide for you family, loved ones, and one or more churches, ministries, and other charities in one document.

### *Options to Consider*

- It can be for a specific amount or a percentage of your estate.
- It can be contingent. For example, "If my husband predeceases me, then I leave a portion of my estate to my church."
- It can be residual. Use this option to leave the remainder of your estate to the church after family and friends have been remembered.
- It can be a percentage of your estate.
- It can be a particular piece of personal property or real estate.

### *How can the Foundation help?*

Contact the United Methodist Foundation of West Virginia, Inc. with any questions or concerns that you might have. The Foundation can provide literature which will help as you consider bequest options. The staff at the Foundation can also help if you would like to establish a Trust with your bequest to create a perpetual financial resource for the church.

There are many other planned giving options; call us to discuss tax benefits of the various types of giving and let us help you make the gift that matches your needs under your circumstances with the needs of the church or ministries you want to support. ☺



# New Officers and Trustees Elected

The Board of Trustees elected new officers at its May 21<sup>st</sup> meeting at Tamarack Conference Center in Beckley, WV. Jeffrey A. Porter, of Huntington, West Virginia was elected to serve as Chairperson; and David Ellwood of Wheeling, West Virginia, was elected to serve as Vice-Chairperson. The Board also re-elected William B. Goode, of Hurricane, West Virginia to serve as Treasurer; Kim Matthews, the Foundation's Associate Director, to continue to serve as Secretary; and Jeff Taylor to continue to serve as President. Bishop Sandra Steiner Ball continues to serve as the Honorary Chairperson. The Board of Trustees also elected three new trustees:



- Rev. Lauren Godwin, a clergyperson from Boaz in the Little Kanawha District;
- Rev. Joseph B. Hill, a clergyperson from Huntington in the Western District; and
- Richard Toothman, a layperson from Fairmont in the Mon Valley District.



The Board recognized the service of two retiring trustees: Rev. Gary Shepard and Rev. Brent Sturm. J. Franklin Long, who continues to serve as a trustee and Chair of the Investment Committee, was recognized for his service as Chairperson of the Board.

The Board also expressed gratitude for Accounts Administrator, Sally Sloan, who will be retiring in July after thirteen years of dedicated service. Sally served first as Administrative Assistant, and then in her current position (since 2012). We give thanks to Sally and wish her well in retirement. ☺

*Images: Joe Long, Former Board Chair (right) and Jeff Porter, current Board Chair (left).*

## Investment Performance

The performance of our four Investment Funds, net of all fees, for the first quarter of 2015 is listed in the table to the right.

*January 1 - March 31, 2015*

Please remember that as your investment objectives change, you should review your investment choices. You can change The Foundation Investment Fund utilized by your Church or Agency by contacting The Foundation.

	<b>Total Return</b>	<b>Comparative Benchmark</b>
<i>Fund A</i>	0.42%	0.78%
<i>Fund B1</i>	1.39%	1.70%
<i>Fund B2</i>	1.55%	1.81%
<i>Fund B3</i>	3.21%	2.12%

Call us if you have questions and to discuss the investment choices offered by The Foundation in greater detail. ☺

*Net of all fees*



United Methodist Foundation of West Virginia, Inc.  
P.O. Box 3811  
Charleston, WV 25338-3811

Phone: 304-342-2113  
1-800-788-3746 ext. 45  
Fax: 304-342-2632  
Email: [info@umfwv.org](mailto:info@umfwv.org)  
Website: [www.umfwv.org](http://www.umfwv.org)  
Facebook: [www.facebook.com/umfwv](http://www.facebook.com/umfwv)

#### Staff

Jeff Taylor, President  
Kim Matthews, Associate Director  
Becky Wolfe, Administrative Assistant

Non-Profit Org.  
U.S. Postage  
PAID  
Chas. WV 25301  
Permit #2780

**Return Service  
Requested**

## Our Mission: To Serve

**W**e welcome opportunities to lead discussions, classes, and workshops about stewardship and planned giving. Be reminded of that as you plan for:

- Clergy gatherings and retreats;
- Lay leadership academies and lay speaker training;
- Gatherings of churches, parishes, or districts; and
- Meetings with individuals who are identified as having a need to know about planned giving.

Need to fill the pulpit on a particular day? Jeff Taylor is a Deacon in the United Methodist Church and Kim Matthews is a Certified Lay Minister. Both are willing to travel to churches to preach or teach.

We are here to serve you. Let us know how we can help you with funding your ministry! ☺

