

1 **NORTH INDIANA UNITED METHODIST FOUNDATION, INC.**

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3 The Foundation assists local churches in promoting good stewardship and building endowment  
4 programs. We also provide churches and their members with useful information on planned  
5 giving. Last year we helped 22 churches with development of their endowment programs or  
6 investment policies.

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8 We provided investment services for over 140 local churches last year. We offer a pooled  
9 investment program consisting of 6 different funds; most are screened to comply with the social  
10 principles. Our total deposits were over \$21.9 million by the end of the year. We also administer  
11 many funds, which support a variety of mission and ministry programs.

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13 **Recommendations**

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15 1. We recommend that every local congregation, that has not already done so, *consider*  
16 *forming a permanent endowment fund or foundation*. The endowment fund or foundation  
17 could then begin a process of educating members on the benefits of planned giving as a  
18 means of increasing funding for future ministries.
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20 2. We recommend a “**Planned Giving Sunday**” be celebrated in every church. This  
21 special Sunday can be used as an opportunity to explain endowment gifts, how they  
22 work, benefits available to donors, benefits to the church, and the joys in giving to the  
23 church they love and the Lord they serve.
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25 3. We recommend that each local church take an appropriate offering on “**Retired**  
26 **Ministers’ Day**” in honor and memory of former ministers who faithfully served their  
27 members. The third Sunday in June (or some other more suitable date) is suggested as  
28 Retired Ministers’ Day.

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30 **Jeff Haley, President**