

Giving Opportunity

I want my tax-deductible contribution to the Corvallis United Methodist Foundation to make a difference.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Yes! I want to make a tax-deductible contribution now.

- Here's my gift of \$ _____.
- This gift is unrestricted.
 - This gift is restricted to: _____

In addition to the Foundation, I want to give to the church's:

- Building Fund \$ _____.
- General Fund (operating budget).\$ _____.

Please have someone contact me with information about:

- Giving to the Foundation through:
- Estate planning.
 - Charitable remainder trusts.
 - Wills.
 - Living trusts/life income agreements.
 - Gifts of life insurance.

Please have someone call me!

Phone number: _____

For additional information you may send email to: cumf@corvallisfumc.org
or call: 541-752-2491

Please place
first class
postage here

Corvallis United Methodist Foundation
1165 NW Monroe Avenue
Corvallis, OR 97330



Corvallis United Methodist Foundation

Making a lasting difference ...

As you take time to consider the blessings God has provided you, keep in mind that the Corvallis United Methodist Foundation provides a way for you to show your thankfulness for God's grace and love. Your generosity will become a perpetual blessing to others.

We work to support the church in its mission "to bring people into a living relationship with God, through Jesus Christ, that we might love the world as God loves the world."

The Corvallis United Methodist Foundation was established in 1977 as a 501(c)(3) corporation registered in the State of Oregon. We provide long-term financial assistance to the First United Methodist Church of Corvallis by acting as a perpetual trustee and administrator for certain gifts to the church.

Purposes

Our two primary purposes are:

- To manage the Foundation's assets for the charitable, educational, and religious purposes of the church; and
- To promote giving to the church.

We also manage a fund benefiting Boy Scout Troop 2 (the church sponsors this troop).

Gifts and Endowments

We treat every gift as an endowment. This allows each donor to make a lasting difference in the ministries of the church. Each gift is invested as principal and most of the earnings are distributed for use in church buildings and ministries. Each year, we retain part of the earnings to help the investments grow over time.

Gifts of any size are welcome. Gifts may be:

- Cash;
- Stocks, Bonds, or other Securities;
- Real Estate (subject to case-by-case review and acceptance by the Board);
- Bequests by Will;
- Charitable Remainder Trust; or
- Life Insurance (CUMF can be the named beneficiary or the owner of the policy).

Substantial income, capital gains, or estate tax benefits may be realized through your gift to the Foundation. Consult your attorney or financial advisor for details and to discuss your options.

Please use our legal name when making a gift:
Corvallis United Methodist Foundation.

Fund Categories

We assign all restricted gifts to a fund consistent with the designation of the donor. Our current restricted funds benefit:

- Building Maintenance and Improvement,
- Christian Education,
- Music Ministries,
- Youth Ministries, and
- Missions.

All unrestricted gifts are placed in our Unrestricted Fund.

Distributions

We have a fiscal year that runs from July 1 through the end of the following June. In July each year we make distributions to the church based on the June 30 fund values.

The church may use distributions from the Unrestricted fund for any program or ministry. This gives the church great flexibility in meeting current needs.

The church must use distributions from restricted funds only for the specified program or ministry.

Named Funds

We manage two funds named for the respective donors:

- The *Robert C. and Patricia McEwan Wilson Fund* benefits music programs of the church.
- The *Frank Mariner Fund* benefits both the church and Camp Magruder of the Oregon-Idaho Annual Conference.

To minimize the difficulties of accounting for many small, special funds, it is our policy to establish named funds only for contributions of \$60,000 or more and then only at the direct request of the donor.

Investment Philosophy

In seeking investment opportunities, we must consider the often-conflicting goals of preservation of capital and growth of capital. To do this, we seek a balanced portfolio containing lower-risk investments with the possibility of moderate growth.

In 2005, we formally adopted a socially responsible approach to investing. This approach was reconfirmed in 2010. This approach places additional screens on the universe of available mutual funds so that we have assurance our investment goals are met.

“Socially responsible” means many things to many people. Our working guidelines are to invest predominately in companies that

- Respect the environment,
- Treat their employees well,
- Have effective equal employment opportunity policies,
- Maintain good community relations, and
- Use ethical business dealings including consideration of human rights.

We do not wish to invest in entities whose core business is in alcoholic beverages, tobacco, gambling, or weapons.