

# THE HIGHLANDS METHODIST FOUNDATION

ESTABLISHED 1993

HIGHLANDS UNITED METHODIST CHURCH

## PURPOSE

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The Highlands Methodist Foundation is dedicated to creating long-term, sustainable financial support for Highlands United Methodist Church through investment of planned gifts. The Foundation's quarterly distributions provide approximately 10% of the church's annual operating budget. The foundation is a 501(c)(3) non-profit, exempt from federal income tax and not classified as a private foundation.

## GOVERNANCE

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The Highlands Methodist Foundation is governed by an eleven-member volunteer Board of Directors, consisting of nine at-large members, the Senior Pastor, and the Church Council Chair.



Investment Policy reflects long-term growth with income and moderate risk profile



Investments professionally managed by Regions Endowments and Foundations Group



Annual spending targeted at less than 5% of principal, including distributions and expenses

## ASSETS

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As of April 1, 2019, the assets of the Highlands Methodist Foundation were approximately \$3,000,000.

The assets are held in six different funds: Second Century\*, Missions, Building Maintenance, Ministerial Housing, Ministerial Education, and the Faye Rogers Music Fund.

\*General Purpose Fund

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## WHY DONATE

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A donation to the Foundation creates a legacy of love. There are many reasons to consider planned giving to the Highlands Methodist Foundation.

For some, it is a sense of faithfulness to extend their annual pledge in perpetuity. Others may feel strongly about preserving our historic sanctuary and campus, which underpins all our ministries as a beacon of hope in Five Points South. It may also be a desire to support a specific ministry and ensure that Highlands United Methodist Church remains vibrant and financially secure for future generations. All are worthy and faithful signs of a Christian heart.

## WHEN TO DONATE

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Estate gifts are made at end of life; however, planning can be accomplished any time you address your financial affairs. The church humbly requests that all members prayerfully consider amending their wills to include a gift to the Foundation.

In addition to estate gifts, the church also encourages gifts to the Foundation through memorials and honorariums as well as from non-recurring financial gains, such as an inheritance and the sale of real estate or a business.

An estate gift compliments your annual pledge and perpetuates your generosity for generations.

## HOW TO DONATE

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Eligible donations must be in the form of liquid assets such as cash, marketable securities, assignment of life insurance proceeds, etc. The Foundation is unable to accept gifts of real estate or personal property.

To discuss a planned gift, make a donation, or learn more contact the church office at 205-933-8751 or John Gaffney, Foundation President, at johngaffney55@yahoo.com or 205-936-8912.

