

INVESTOR UPDATE

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A New Era of Partnership

We are excited to announce a new development for the United Methodist Foundation of New England (UMFNE)! As you know, the Foundation exists to support the mission and ministries of churches, and to complement conference initiatives. In pursuit of that mission, we are continually inspired by partners like you to approach investing with creativity, intention, and alignment with our shared values. Our model and the collective impact we have made together has not gone unnoticed among other United Methodists.

One such organization is the United Methodist Frontier Foundation, which serves the New York and Upper New York conferences. Over time, we have developed a strong collegial relationship with their leadership. Last year, leaders from both organizations and their boards began exploring how our ministries might serve churches in both conferences.



After a period of prayerful discernment and consultation, the boards determined that bringing our organizations together as one foundation was the most effective way to expand this work and in January, we began investing funds on behalf of 200 churches in the New York and Upper New York conferences. We look forward to supporting these congregations and formally introducing our full range of ministries throughout New York.

While this is a very exciting time for us, we assure you that our commitment to you has not changed and nothing will be required of our New England partners. We will continue to provide the excellent service you – and all New England churches – have come to depend on; this remains central to our identity and mission.

New staff members will be joining us in New York to serve the New York churches. As our partnership continues to take shape, we will be sharing more details about this new relationship with churches in the New York conferences and how this transition enhances our ability to support and serve you!



Managing Risk

“If you can keep your head when all about you are losing theirs....” Rudyard Kipling

There are several types of risk with respect to investments and investing. Geo-political risk is top of mind given the current war in the Middle East. Certainly, we hope and pray for a lasting peace in the Middle East, and recognize that the unknowing and fear add to the geo-political risk, especially in the energy sector.

While the Foundation does not give advice, we do provide education for church trustees. The governing principle and solid foundation for this education is maintaining a **long-term view** for **long-term investments**. For most of our churches, their investments consist of long-term endowments created by donors with the intent of providing income in perpetuity. The long-term nature of endowed funds requires a consistent, disciplined, and stay-the-course approach.

There have been many times in our memory that events evoked fear of loss of market value. The dot.com bust 2001-2002, the credit default swap fiasco of 2008-2009, not to mention the fear of the 911 attacks, remind us that the stock and bond markets rise, fall, experience market corrections, and volatility. The good news is that for all of stock market history, after falling, and given time, new highs are reached. Remaining fully invested means that you will not miss the opportunity when the market moves forward.



Once again, we thank you for your continued trust in us and for the vital work you continue to carry out in your communities and congregations!

UMFNE will remain steadfast as your partner in ministry, faithfully stewarding resources as you live out God’s mission through your faith community. We cherish our partnership, welcome your questions, and look forward to speaking with many of you further in the months ahead and at Annual Conference.

Yours in Christ,

Ted Crass, President