THE BRIDGE

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From the Foundation

Enhancing Services for Investments



Dear Friends,

On my flight home from the annual meeting of the National Association of United Methodist Foundations (NAUMF), I found myself reflecting on how fortunate my UMFNE colleagues and I are to spend our days on such an important mission: helping ensure you are on solid financial footing, and partnering with you as you minister to and serve others.

As the year draws to a close, this third issue of *The Bridge* focuses on investment year-end planning. We lead with an important change: valuations are moving from monthly to weekly, giving you the flexibility to withdraw funds from your accounts at any point in the month. You'll also find our new money market rates, a practical tip on maximizing investment income, and a conversation with Kim Gluck, who leads our Investment Committee.

Conferences like NAUMF are a chance to sit with people from around the country who do what we do and compare notes. The challenges churches face in New England and New York are much like those in other conferences. What sets us apart is our rigorous pursuit to deliver even greater value to our investing churches through services to church ministries.

Most importantly, we're listening to churches and building what you tell us you need.
That listening makes a difference. Our *Putting Your House in Order* program drew strong interest from foundations across the country. One session also pointed toward another next step for us: *FreeWill*, an online tool that helps people create their will. About two out of three adults haven't written one. A tool like this would complete the circle by connecting last month's gift planning conversation to a simple first step anyone can take.

Whatever the year ahead brings, we're well positioned to help our churches meet it, and we're grateful to be your partner in ministry.

With gratitude,

Pam DiMartino
CFO & Director of Gift Planning

News

Weekly Valuations Provide Flexibility



Twelve times a year is now 52. Starting this month, the Foundation values its funds every week instead of once a month. When members log in to their online account, they'll see unit prices that reflect the market now, not where it stood weeks ago.

Withdrawals move faster too. Under the previous schedule, a request sent early in the month didn't move until month-end. Now withdrawals will be processed within five business days.

"Our members told us they wanted to see where their money stands, especially when markets experience volatility, and to access their funds when they need it," said Ted Crass, UMFNE president. "Weekly valuations give them both. Even though invested assets are long-term funds, we firmly believe a church shouldn't have to plan a repair or a mission payment around a financial institution's calendar. Now they don't need to."

That means treasurers and finance committees will be dealing with current numbers whenever they meet, and access to money when the boiler breaks or the mission trip deposit comes due.

Money Market Rate Moves Higher



To give our ministry partners more value, the Foundation continually negotiates higher rates with banks and has suspended its investment fee on Money Market accounts. Together, those two changes currently bring the rate to 3.5%.

That means more earnings on money your church keeps liquid and fully insured. Reserves, building funds, and money set aside for next year's budget will do more work while you wait to use it, so you have more to spend on ministry in your community. You'll find details in the investor update that came with your 3rd Quarter statement. Please contact the Foundation with questions!

Profile

You Will Know Them by Their Love (and Fruits!)

For more than 25 years, Kim Gluck has helped the Foundation invest in a way that matches what it believes. Her test hasn't changed: would we be proud if people could see what we own?



Kim Gluck has had a rewarding career in the investment business with a series of achievements. But she remembers when she found her people.

It was the 1990s. Gluck was a young portfolio manager at State Street, drawn to an idea most of Wall Street ignored: screen portfolios for social and environmental harm, and use your power as a shareholder to push companies to do better. Few clients wanted it. The ones who did were a group of Catholic nuns, her first ESG clients in 1994, and the United Methodist Foundation of New England, whose portfolio she managed.

"The Methodists and some of the Catholic nuns were the ones who believed in what we were trying to do," she said. "When you find your people, you stick with your people."

Read More

Tip

Turn Your Endowment into Steady Income



Most churches need dependable income from their endowments. One approach is to look at the fixed percentage payout option in the Balanced Growth fund. Instead of making one withdrawal after another or living on whatever the account happens to earn, a church can receive a set percentage of its balance every quarter. The Foundation's investment committee sets that rate each December. One church that made the switch saw its annual payout rise from $8,000 to just over $14,000 while its accounts continued to grow in the market. As a finance committee builds next year's budget, now is a good time to ask whether this option fits their church.



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