

INCREASE YOUR INCOME

A Charitable Gift Annuity with the New Mexico Conference Methodist Foundation may help you increase your annual spendable cash, cut your current income taxes, and make a significant gift to your favorite United Methodist institution and/or congregation. The annuity rate is determined by your age at the time you create your gift annuity.

Here is a sampling of current rates and benefits for a single life gift annuity created with \$10,000 cash:

Age	Payout Rate	Annual Income	Tax-free Portion	Charitable Deduction	Effective Return Rate *
60	5.7%	\$ 570	\$340	\$1,762	7.4%
65	6.0%	\$ 600	\$376	\$2,458	8.0%
70	6.5%	\$ 650	\$433	\$3,072	9.0%
75	7.1%	\$ 710	\$500	\$3,753	10.1%
80	8.0%	\$ 800	\$590	\$4,395	11.7%
85	9.5%	\$ 950	\$742	\$4,874	14.3%
90	11.3%	\$1,130	\$910	\$5,454	17.5%

* This rate represents an equivalent, fully taxable yield in the 28% bracket calculated with the Applicable Federal Rate for May 2008. Actual numbers may be slightly different, depending on federal discount rates at the time of the annuity's creation.

Note: These rates are recommended by the American Council on Gift Annuities. Rates for a two-life gift annuity are lower and are available upon request.



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Volume 7 Number 2

The CORNERSTONE

...helping United Methodists build for the future

May/June 2008

Get Involved: Donor Advised Fund

The Donor Advised Fund is a popular and easy way to make a gift of appreciated stock or property, with investment proceeds distributed over time to your church, other Methodist institutions or both. The DAF allows you to be actively involved in the giving process and receive a tax deduction.

During 2008, the **Kuntz family (Dru Ann, Dave, twins Lynn and Sara and Alan)** established the first Donor Advised Fund created through the NMCMFI. Their gift is in remembrance of Dru Ann's parents, **Josephine and Thomas Render.**

"Giving to others was always very important to my parents, Thomas and Josephine Render," said Dru Ann. "I thought this might be a way to set up something that would last for many years."

If you know you want to make a charitable gift at a particular time but have not determined the specific ministries you wish to fund, you can make the gift now and recommend distributions later. The Kuntz family established their fund this year, but have not yet determined how they'd prefer distributions are used.

Gifts to a DAF, made in cash, stocks and/or bonds, can be added to at any time and in the way most convenient to you. Appreciated securities are frequently used to establish DAFs. This type of gift tax benefits and allows you to support ministries among several different settings.

The Foundation consults you annually about your recommendations on how the funds will be distributed. With your advice in mind, the Foundation's board of directors authorizes distributions.

"The Donor Advised Fund allows

us to continue to have input as to where the distribution will be sent," Dru Ann noted.

"I would encourage someone to look at the DAF because their family will continue to think about how the donation will be used rather than giving a donation once and that is it."

Your DAF is named according to your preference, honoring or remember whomever or whatever you wish, including your family, good friends or influential people in your life. Unless you request anonymity, the recipient of your DAF is advised funds come from your named DAF.

A DAF is a great tool for engaging the next generations of your family in discovering and using the meaningful practice of wise giving. Your family members can be included as "advisors" about distributions.

The Foundation handles all the details of recommended distributions and provides donors tax information for their deductions.

For information about establishing a DAF, contact Sanford Coon, executive director, at Sanford@nmcmfi.org, Marilyn Large, outreach/communications, at marilyn@nmcmfi.org or call them at 800-678-8786 or (505) 255-8786.



The **Kuntz family**, on back left, Alan, Dave, front left, Sara and Dru Ann, pose with a certificate of appreciation for being the advisors for the Foundation's first Donor Advised Fund. Sara's twin, Lynn, was not present.

MINISTRIES AROUND THE CONFERENCE

Shared Table Loves People Through Basic Needs

Shared Table, a ministry at El Pueblito United Methodist Church in Taos, aims to help its local people through food, personal health care items, books, blankets and emergency assistance.

The mission, which is a separate entity from the church, includes giving medical, dental and pharmaceutical help as funds allow.

Since its inception, Shared Table has helped almost 5,000 adults and 2,000 children the past year. Shared Table's mission is to "listen to our church family and the community, to help provide services and support and to foster a center for growth in the love and spirit of Christ."

Directed by the Rev. Stephen Wiard, with assistance from pantry manager Helen Riley, Shared Table operates under the umbrella of the church and with a separate board of directors and treasurer. While two-thirds of the board are members of El Pueblito, remaining members are from the Taos community at large.

The greatest need for the ministry is food items that can be kept in a walk-in freezer and refrigerator on the premises, but financial donations are also needed. Cash contributions can help pay for the van that transports food items and to pay part-time employees. Cash also will allow purchase of food and health care items not donated.

Non-food items that are needed include soap, shampoo, toothbrushes and toothpaste, disposable diapers, toilet paper.

An investment fund was established through the New Mexico Conference Methodist Foundation to help support Shared Table's ministry.



Shared Table ministry, 1309 Paseo del Pueblo inside El Pueblito UMC, Taos, N.M. 87571, 505-758-3166

Annuity Payment Rates Drop July 1

Rates for new gift annuities will drop July 1, according to a report from the American Council on Gift Annuities Conference.

Current rates for age 60 to 90 range from 5.7 percent to 11.3 percent. Under the new rates for those ages, rates will range from 5.5 to 10.5 percent, impacting payments to annuitants. Under the change, payments for most ages drop 0.2 to 0.4 percent because of the general drop in interest rates and applicable federal rate.

The New Mexico Methodist Founda-

tion currently manages more than 50 gift annuity funds for donors who receive monthly, quarterly, semi-annual or annual payments that will continue distributions at the current rate. Potential donors are encouraged to establish new funds prior to the rate change in July.

For information about establishing a gift annuity through the Foundation, contact Sanford Coon at sanford@nmcmfi.org, or Marilyn Large at marilyn@nmcmfi.org.

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**Notes from the Executive Director
Sanford Coon**



**Foundation Enters
New Era
with Services**

Since its founding in 1965, the Foundation has centered its daily activities in an office located in Albuquerque. Early in the life of the Foundation, the role of the director was either a part-time position or part of the portfolio of responsibilities of the conference executive. It was not until the mid-1980s that the position of executive director could be formalized into a full-time, paid position, and the Reverend Jerry Jackson served for more than a decade in that role. Upon his retirement, the Reverend William Hutchinson brought his giftedness to the position.

Across these decades the offices of the Foundation were closely associated with those of the Conference, including being housed with other offices on Mountain Road. Our operations have continued to be housed in the Methodist Conference Center since our move to Lomas Boulevard in 2006. While the Foundation remains a separate legal and operational entity from the Conference, the linkage of mission and ministry is intentionally supportive.

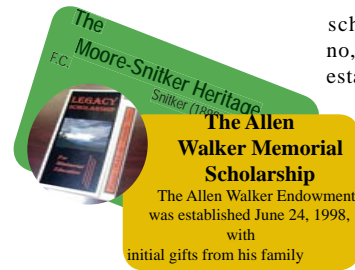
Beginning in July, the Foundation will enter a new era in its capacity to serve congregations and institutions in the southern area of our expansive Conference. A new "remote" office will be established in Las Cruces with the deployment of Marilyn Large to enhance the capacity of the Foundation to be easily accessible and available. Marilyn has earned the respect of every group that she has served as the Director of Communication and Outreach in the past several years. Thanks to technology, she will continue to serve in that role. Thanks to geography, she will be expanding the familiarity with the Foundation across the southern part of our Conference.

This development has occurred after several years of discussion, reflection, and prayer. We just hadn't known until recent weeks how God would move us to these new possibilities. Shortly after Marilyn and James settle into their new home setting in Las Cruces, we will provide contact information to each congregation about ways to reach Marilyn to access her counsel and to develop plans for her presence and service in your particular setting.

Whether from the office in Albuquerque or in Las Cruces, it will be the mission of the Foundation to serve individuals, families, congregations, and institutions in joining faith and money into a dynamic relationship.

Got Scholarships?

Does your church have any scholarships? If your answer is no, the Foundation can help you establish a scholarship fund. The process is relatively simple. Through individuals, churches and church groups like Sunday school classes or the New Mexico Conference, a variety of scholarships can be created to respond to specific needs. Scholarships established



by a church can remember an influential lay person or well-loved former pastor, can be a farewell gift to a departing pastor or help youth attend Methodist camps. Scholarships also can help future Methodist pastors enrolled in higher education institutions or seminary.

A new scholarship launched by the Board of Ordained Ministry is the Legacy Scholarship for Ministerial Education. Initial support is being provided by founding donors who are retired pastors and spouses. All laity and clergy can make gifts for commitments by the close of Annual Conference this June to joins the ranks of founding donors helping clergy in the Conference for generations to come.

Scholarships can be established to answer a variety of needs frequently noted by church ministers, pastors and others within the church family. The Rev. Martha A. "Marty" Singleterry Scholarship for Women Preparing for Ministry exists through the permanent endowment fund established to support women going into ministry. The Rev. Singleterry desired to encourage and support women studying for ordained ministry because she experienced encouragement and support when women were not so prevalent going into ministry.

In 2006, Marjorie Ann Goode saw need to establish a scholarship for seminary students as an expression of her appreciation to those who ministered to her during her lifetime that included a terminal health condition. She was concerned about helping ministry students with the burden of rising educational costs.

The Foundation establishes endowments for donors and distributes funding, but has no involvement in accepting applications or choosing recipients.

To learn more, contact Sanford Coon, executive director, at sanford@nmcmmfi.org or Marilyn Large, Director of Outreach and Communications, at marilyn@nmcmmfi.org.

"THE PARISH PAPER"

by email

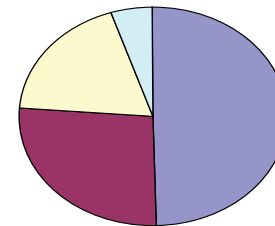
Contact jennifer@nmcmmfi.org
800-678-8786/505-255-8786, ext 113
request online copies.

SHARED MINISTRY



**FUNDS HELD IN THE NEW MEXICO CONFERENCE
METHODIST FOUNDATION, INC.**

3/31/2008



222 Local Church Funds	- \$18,940,824.13	49%
31 Conference Funds	- \$10,230,339.43	27%
124 Institution & Endowment Funds	- \$7,285,630.62	19%
86 Charitable Remainder Trusts & Annuities	- \$1,869,275.37	5%

**FUNDS UNDER MANAGEMENT
MARCH 31, 2008**

FUNDS	AMOUNT	
222 Local Church Funds	\$18,940,824.13	49%
31 Conference Funds	\$10,230,339.43	27%
124 Institution & Endowment Funds	\$7,285,630.62	19%
86 Charitable Remainder Trusts & Annuities	\$1,869,275.37	5%
	\$38,326,069.55	100%

Foundation Staff Will Present Information to Your Congregation or Church Group:

- Will/Bequests
- Estate Planning/Women
- Charitable Gift Annuities
- Establishing Endowment Funds
- Donor Advised Funds
- Giving Securities
- Giving through Life Insurance
- Giving for Income

Fund holders may choose to receive **ONLINE Fund Holder monthly account statements**

Join other good stewards of resources accessing fund statements electronically!

Contact Molly Emkes
Executive Assistant
molly@nmcmmfi.org

to learn how you can register for your online statements.



Member of the National Association of United Methodist Foundations

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STAFF TO SERVE YOU

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Molly Emkes

Executive Assistant

Marilyn Large

Director of Communications & Outreach

Jennifer E. West

Communications Assistant



I am interested in receiving further information about the following:

- Making a Will Estate Planning Donor Advised Funds
- Establishing an Endowment for: My Church A Specific Ministry
- Giving Appreciated Stock and Property

I want to receive the free eNewsletter, "GiftLegacy"

I want to receive **The Cornerstone** Newsletter or correct my name or address

Please send the Wills and Trust Planning Guide

I have a request:

Name: _____ Date: _____

E-Mail: _____ Phone: (____) _____

Mailing Address: _____ City: _____

State: _____ Zip: _____ Fax: (____) _____