A 35 Year Journey

From our first year in 1974, a vision was formed and we entered into a new season looking forward toward God’s possibilities. Over the last 35 years, we have been blessed to be a partner in ministry with numerous individuals, local churches and Conference-related ministries across the West Virginia Annual Conference.

While celebrating the past, we look toward the future. Your Foundation continues to provide a vehicle to plant seed gifts that enable ministry and mission to grow from the past to the present and on into the future.

Your Foundation has grown substantially. In 1989, fifteen years after the Foundation was begun, the total assets under management reached 3 million dollars. Total gifts for all purposes for the year 2009 exceeded that mark. During the past 35 years, assets under management have grown to almost 50 million dollars. Distributions in 2009 were more than total assets under management in 1986. The giving spirit of so many has sustained United Methodists in the past and gives them hope for the future.

This 35 year journey of service has brought many blessings and the road ahead will bring many more. Thanks be to God for those who had the vision of the future and to those who will continue to look toward the future and God’s possibilities.

Consider the possibilities

Our Services Include:

Planned Giving Education
We work with individuals and their advisors to help match their needs with the needs of ministry.

Stewardship Education
We help churches learn that stewardship is a whole-life response to God’s love.

Investment Services
Churches and institutions affiliated with the West Virginia Annual Conference can take advantage of our economies of scale, our investment consultant, and our money managers - some of America’s best.

Endowment Development
It is our goal to assist every church in the West Virginia Annual Conference to establish an endowment.

We will work with your church on a step-by-step process of establishing an endowment program that best fits the church’s needs.
As a Foundation, it is necessary to report the numbers. Here is another number: 35.

The United Methodist Foundation has its beginnings in a Special Session of the West Virginia Annual Conference in September 1974. In 2009, we celebrated our 35th birthday. To the left of this article, you see “the numbers” for 2009. But there are many stories behind these numbers - stories of how lives are transformed by gifts from donors who left a legacy of Christian generosity. For example:

For 35 years, the Foundation has provided scholarship grants for students in college and seminary. The number and amounts of these have grown over the years. Recipients see these not only as financial assistance, but also as tangible symbols of support and encouragement from the Church. One seminary student expressed that the scholarship she received was like God telling her, “You are on the right path. It won’t be easy, but keep putting one foot in front of the other and rely on Me.”

The Foundation manages several trusts that provide benefits for the United Methodist Committee on Relief. For 35 years, as we have heard of natural disasters, hunger, and widespread illnesses and the devastating impacts these have had on other parts of the world, we were able to send funds for various kinds of relief efforts from the income generated by these trusts. The legacy left by these donors has touched the lives of those suffering from a disaster unpredicted when the trusts were created.

2009 marked the beginning of the Foundation Grant program. When the Foundation started 35 years ago, funding came in part from loans made by the Annual Conference. As the Foundation grew and became self-funding, a schedule was agreed upon for loan repayment. When the loan was completely paid off in 2008, our Board of Trustees decided to use the amount budgeted annually for loan repayment to award Foundation Grants. In 2009, for example, the Foundation was able to help underwrite the Africa University Choir Tour and the Holy Land Tour for recent Conference ordinands. These grants are the Foundation’s grateful response to the many ways the Annual Conference has supported our ministries for our 35 years of existence.

Consider the possibilities...

Jeff Taylor, President
We wish to lift up the names of the many donors who gave in 2009.
Thank you for considering the possibilities!

All gifts were placed into new or existing agreements benefiting
United Methodist Churches, Conference-related ministries, and other
Christian ministries both inside and outside the West Virginia Annual Conference.

Rev. & Mrs. Larry K. Albright
Rev. Jeff & Laura Allen
Rev. Timothy J. Allen
Rev. Lois K. Almond
Mr. & Mrs. Arthur L. Altman
Helen Anderson
Isabelle M. Ayers

Emory Ballengee
Robert D. Barnes
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Rev. Arnold D. Belcher
David V. Belcher
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First Century Bank, Bluefield
First UM Church, Barboursville
First UM Church, Beckley
First UM Church, Huntington
First UM Church, Ravenswood
Linda Fluharty
Forrest Burdette Memorial UM Church, Hurricane
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Sylvester Fretwell
Sara Fuqua

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Judith A. Guyer
Col. John Gwinn
GWP Foundation, Inc.

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Katherine & Richard Harlow
Mr. & Mrs. Craig C. Harris
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Ann W. Harrison
Brookie B. Henry
James R. Hervey
Phyllis Hewitt Highland
Wanda P. Hinkle
Mr. & Mrs. R. Mark Honaker

(continued on page 4)
House of the Carpenter, Wheeling
Mr. & Mrs. Richard H. Hudson
A. J. Humphreys Foundation
Kathryn M. Hunt
Mr. & Mrs. Ronald D. Irons
Bishop & Mrs. S. Clifton Ives

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John Jarrett
Dr. & Mrs. J. Clair Jarvis
Dr. Patricia A. Jarvis
Raomi Jean Jewell
Rev. & Mrs. Jonas Johnson, Jr.

Johnson Memorial UM Church, Huntington
Rev. & Mrs. Robert P. Johnson
Patricia C. Johnston & Larry Frail
Mr. & Mrs. J. Brooks Jones

Maudie & David Karickhoff
Mr. & Mrs. C. Dallas Kayser
Janet Kemp
Kenova UM Church, Kenova
Rev. Angela Gay Kinkead
Koinonia Sunday School Class
Mr. & Mrs. William Kosto

The L. K. Trust
Lahmansville UM Church, Lahmansville

Opal V. Lantz
Rev. Keith E. Leap
Richard W. Lee
Leggett UM Church, Biloxi, MS
Betty Kay Leitelt
Rev. & Mrs. Harry P. Light
Rev. John W. Lipphardt
Rev. Douglas E. Liston
Barry & Barbara Locke
Jane I. Long
Ruth E. Looney
James M. Love
Patty & Joe Love
Lubeck UM Church, Washington
Bishop & Mrs. Ernest S. Lyght
Marilyn Lynch

Glen and Shirley Maley
Go-Mart, Inc.
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Charles McClure
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Rev. Bilee Scott Mick
Midland South District
Mill Creek Presbyterian Church
Women, Mill Creek
Rev. & Mrs. Maurice Miller
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Howard and Doris Mitchell
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JP Morgan Investments

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James V. Morris Estate
Todd A. Mount
Mount Juliet UM Church, Belle
Mr. & Mrs. Ronald J. Mullenix
Beth & Marc Myers

Carrie L. Newton
Dr. Mabel Nichols Estate
Lynne M. Niederkorn

James Owrey
Otterbein UM Church, Elkins

Suzanne & Fletcher Parsons
Benjamin A. & Sayaka Peters
Rev. & Mrs. David R. Peters
Scott & Carole Peters
Jeffrey A. Porter
Potomac Highlands District
Mr. & Mrs. Joseph Powell
Jane F. Proper
Sharon M. Prunty
Dr. & Mrs. W. Kenneth Pyles

Mr. & Mrs. Bob Ramsburg
James H. Reed
Rev. Damon E. Rhodes
Joanne Rhodes
Rev. & Mrs. John Riecks
Mr. & Mrs. Jack H. Riggs
Mr. & Mrs. Ronald N. Roberts
Rev. & Mrs. Robert B. Robey

(Continued on page 5)
In his book *Five Practices of Fruitful Congregations*, United Methodist Bishop Robert Schnase of the Missouri Conference makes the following statements about becoming an *Extravagant Giver*:

- Generosity enlarges the soul, realigns priorities, connects people to the Body of Christ and strengthens congregations to fulfill Christ’s ministries.
- How people use what they have matters to God.
- All Christians practice generosity while some are particularly gifted by the Spirit to give in extraordinary measures.
- At some point, followers of Jesus must decide whether they will listen to the wisdom of the world or to the wisdom of God.
- Offering money and other possessions to God results from generosity of heart rather than from mere duty or obligation.
- Giving is always extravagant, life changing, and joyous.

How do these statements relate to you and/or your church family? Think about them and **consider the possibilities** of becoming an *Extravagant Giver*. 

*Thank you to all of our anonymous donors. We regret the unintended omission of any donor’s name.*
Love each other with genuine affection, and take delight in honoring each other.
Romans 12:10

Honorary Gifts
are given in recognition of individuals that have touched us through Christian love, fellowship and service.

Gifts were given to honor the following individuals:

Drs. Jean & Dion Arthur
President Pamela Balch
Edward & Pam Barnette
Arnold Belcher
Carol Brown
Donald L. Cale
Carol & Doug Duffield
David & Judy Gommoll
Bishop William Boyd Grove
James H. Harless
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Rev. David R. & Harriet G. Peters
Joe & Sheila Peters
Dr. & Mrs. Jack M. Sink
Sally & Vernon Sloan
Dr. Roger Smith
Joyce & Dirk Spencer
Floyd & Geraldine Taylor
Jeff & Mary Taylor
Joel Taylor
Joyce & Jack Townsend
UM Foundation’s former & current staff

Memorial Gifts
are made to celebrate the lives of deceased family and friends.

Memorial gifts were given as an expression of love for the following individuals:

Earnest Jay Adkins
Ruby Bailey
Don Ballard
Naaman J. Barker
Rev. Daniel E. Bayer
Cassie Bias
Danzel Bosso
Ramsey Bridges
Mary Carr Cain
Roger Carnal
Jack Clark
Dr. Rev. Claude R. Collins
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James M. Jarvis
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Dwight McMahon
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Rachel McMullin
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Imogene Miller
Wanda B. Mitchell
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Jeffrey C. Ohl
Russel H. & Maxine Shay Peters
Louise Piccirillo
Paul Preston
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Richard Schultz
Sam & Rebecca LaDusca Sink
Billie E. Skiles
C. R. “Bob” Skiles
James Skiles, Jr.
Roy & Ruby Skiles
Rev. Edwin A. Smith
Dr. Bruce O. Snider
Hazel Wood Sparks
Sarah Florence Spencer
Thomas Preston Spencer
Ethel L. Stout
Rev. William Street
Floyd H. Taylor, Jr.
Dr. Rev. Virgil Ware
Alberta J. Wegley
Keefer Whitman
Mazel Wiggins
Lessie Wilson
Mickey Wilson
Edward Wood
Venice & Warren Wood
Dr. William A. Woods
Ten new Trust agreements were established in 2009 totaling $419,081
These new Trusts are listed below. Purpose or beneficiary of each is noted in italics.

Arthur L. & Nancy G. Altman Donor Advised Trust
Donors advise regarding the use of the funds

Calvary UM Church Endowment Fund, Ripley
Perpetual financial resource for the ministries of the church

GWP Foundation, Inc. Endowment Trust
Financial resource for GlenWood Park Retirement Village, Princeton

Leah Henry Memorial Scholarship Trust
Provide financial resource for college scholarships to students involved in the ministry of Trinity UM Church, Point Pleasant

Richard W. Lee Trust
Perpetual financial resource for the ministries of Central UM Church, Fairmont

Beulah B. Shomo Memorial Trust
Perpetual financial resource for the ministries of Chapel Hill UM Church, Buckhannon

Hazel Wood Sparks Memorial Trust
Financial resource for United Methodist Temple, Beckley

Floyd H. Taylor, Jr. Memorial Trust
Perpetual financial support for Cross Lanes UM Church, Cross Lanes

Wellspring of Greenbrier, Inc. Scholarship Trust
Financial resource for awarding scholarships determined by the Board of Wellspring of Greenbrier, Inc.

Ellen R. Wilson Memorial Trust
Support the ministries of the United Methodist Foundation of West Virginia, Inc.

Two Trusts were established by Gift Annuity Remainders in 2009.
Beneficiary of each is noted in italics.

Marguerita & Walter Hoffman Trust
Financial resource for Wade Chapel UM Church, Red House

Robert D. & Jeanne K. Ross Memorial Trust #2
Support of United Methodist ministry

Hebrews 3:4
Leah Love was eighteen months old when her father passed away, leaving her mother to make a home for herself and their two small children as a single parent during the Great Depression. It was a difficult task during challenging times.

In 1954, Leah graduated from Point Pleasant High school and married Brookie Henry in Trinity United Methodist Church. Leah and Brookie have two daughters, both of who were confirmed and married in the same church. Tragically, Leah passed away in 2008. But her legacy of generosity lives on!

In memory of his wife, and in recognition of the difficulties of providing a home and education for children during challenging times, Brookie has created the Leah Henry Memorial Scholarship Trust with the Foundation. This Trust will be a perpetual financial resource to fund college scholarships for the youth of Trinity United Methodist Church. In addition to recognizing academic excellence, Brookie knows that it would be important to Leah to provide financial assistance to those students who do not have other means to pay for a college education. The criteria for the scholarship award provide for special consideration to children of single parents.

This Trust is a fitting memorial to Leah Henry, reflecting her love of her Lord and her church, the value she placed on education, and the empathy she had with those struggling to raise a family. It will provide scholarships that will transform lives!

God calls us to reach out to others, providing assistance for those in need. Brookie Henry’s generosity in the creation of the Leah Henry Memorial Scholarship Trust provides an example of how each of us can answer that call to stewardship.

Consider the possibilities of answering God’s call to reach out to others.
Fifteen Custodial Accounts were established in 2009 totaling $1,260,844
These new Accounts are listed below. Purpose or beneficiary of the account is noted in italics.

Winifred B. Arthur Memorial Fund
Financial resource to be used as determined for Cross Roads UM Church, Huntington

Asbury UM Church Capital Improvement Fund, Charleston
Providing funds for major capital improvements

Virginia Bonds Memorial Reserve Fund
To be used as a financial resource for the ministries of First UM Church, Beckley

Canaan UM Church Mission and Ministry Fund, Charleston
To support the missions, ministries and operations of the Church

Canaan UM Church Promised Land Fund, Charleston
Financial resource for capital expenditures and improvements

Cross Roads UM Church Twenty-First Century Fund
Financial resource for Cross Roads UM Church, Huntington

Heart and Hand House Building and Emergency Fund
Emergency financial resource to be used for Heart and Hand House of South Charleston

Heart and Hand House Reserve Fund
Financial resource to be used for the ministries of Heart and Hand House of South Charleston

Midland South District Capital Improvement Fund
Financial resource for capital improvements in the Midland South District

Jeffrey C. Ohl Educational Scholarship Fund
Financial resource for Johnson Memorial UM Church, Huntington, to provide scholarships for advanced education to students of the Church

St. Marys UM Church Endowment Fund, St. Marys
To be used for the purchase, maintenance, improvement and upkeep of the building(s) and grounds of the Church

St. John’s UM Church Capital Improvement Fund, South Charleston
Providing funds for major capital improvements

Duncan and Grace Sturm Memorial Fund
Financial resource for the ministries of Johnson Memorial UM Church, Huntington

West Virginia Flood Disaster Relief Fund
Provide financial relief for victims of flood disasters in West Virginia

Lloyd Snyder and Eva Snyder Widmyer Memorial Fund
Financial resource for the ministries, programs and maintenance of the facilities and/or property of Lahmansville UM Church
A Custodial Account is commonly known as a deposit account. It is a convenient way for a church or agency to place money with us for investment.

Some advantages of a Custodial/Deposit account are:
- Deposits and withdrawals at any time in any amount including income and principal
- No maturity dates
- No penalty for withdrawals
- Reasonable investment returns

Custodial Accounts are a wonderful way to fund Special Ministries. The Scholarship Committee of Johnson Memorial United Methodist Church, Huntington, established a Special Ministry Fund entitled the Jeffrey C. Ohl Educational Scholarship Fund in loving memory of Jeffrey C. Ohl. The genesis of the fund at the Church was through a generous contribution by Jeff’s parents.

Read Jeff’s story. Consider the possibilities of what Special Ministries your church can offer by establishing a Custodial Account at the United Methodist Foundation of West Virginia, Inc.

The Jeffrey C. Ohl Story

Johnson Memorial United Methodist Church, Huntington, was Jeff’s church home his entire life. He was active in Sunday School, the Youth Fellowship and Youth Choirs. He was an outstanding student, graduating with honors from high school and from the U.S. Naval Academy.

Following graduation, he was commissioned a Second Lieutenant in the United States Marine Corps. He completed primary flight training at Whiting Field near Pensacola, Florida. Jeff died September 23, 1983 in a military aircraft training crash.

Jeff’s family and his church feel very deeply that this Educational Memorial in his name will exemplify his discipline and determination to God, Country and Family and his strong sense of the need for continuing education for those persons seeking it. It is an expression of faith in the high ideals exemplified by Jeff’s life and provides financial aid to help further advanced education, either academic or vocational.

This Fund and the scholarships it provides, enable Jeff to continue to touch lives beyond his lifetime.
Two Gift Annuities
One Individual

Two gift annuities were established in 2009 by one individual. The remainder of both annuities will benefit a United Methodist local church in the community the individual lives.

The charitable gift annuity is a wonderful way to make meaningful gifts while enjoying income and tax benefits that can also help enhance your future financial well-being. The remainder of the gift will benefit a United Methodist local church or Conference-related ministry designated by the donor.

Establishing an income gift (Gift Annuity/Unitrust) is like sowing a grain of mustard seed. It will assist in providing for your needs and will continue, after your lifetime, to provide for needs of others per your designation.

Consider planting your mustard seed by creating an income gift. Think about the many ways you can leave a legacy and share God’s blessing.

“It is like a grain of mustard seed which a man took and sowed in his garden; and it grew and became a tree, and the birds of the air made nests in its branches.”

Luke 13:19

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“CREATE YOUR OWN CHARITABLE GIFT ANNUITY
A gift that gives back now and later

You can:
- Endow your local church or favorite ministry
- Receive fixed income for one or two lives, part of which is tax-free
- Claim an income tax deduction in the year of your gift

Contact the United Methodist Foundation at:
800-788-3746 ext 45
Email: info@umfwv.org
On-line: www.umfwv.org

Gift Annuity Rates
Here is a sampling of rates effective July 1, 2010 and benefits for a gift annuity created with $10,000:
It was the best of times, it was the worst of times.

I imagine Dickens’ famous line has been quoted more in 2008 and 2009 than ever - if not the entire quotation, then at least the second half.

It did seem like the worst of times at the beginning of 2009. During the last half of 2008, we saw the worst stock market crash since the Great Depression, and we began 2009 wondering whether we were experiencing another depression or simply a recession. Many people were in fear; fear of losing their jobs, their retirement, their savings, or even their homes. For many, it was the worst of times.

And yet it was the best of times. United Methodists of the West Virginia Annual Conference did not stop giving because of their fears. Perhaps it was the economic times that moved them to respond. In the midst of economic turmoil, in 2009 nearly a million dollars was given to trusts and endowments managed by the Foundation. In a sense, this is seed money: funds that are set aside to grow and to produce a stream of income forever.

In the Foundation’s 35-year history, seeds have grown into orchards bearing fruit for the benefit of the those served by the churches, ministries, and institutions of our Conference. Those who have witnessed the harvest have responded by giving back, and so a cycle of generosity continues.

It is an unparalleled blessing to be a part of this rich ministry.

Jeffrey A. Taylor, President
### Beneficiaries of Trusts and Accounts

**Greenbrier District Local Churches**

**Little Kanawha District Local Churches**
Bethany UMC, Calvary UMC, Christ UMC-Parkersburg, Elizabeth UMC, Fairview UMC, First UMC-Parkersburg, First UMC-Ravenswood, First UMC-Williamstown, Lubeck UMC, Parkview UMC, Pennsboro UMC, Pleasant Hill UMC, Rosemar UMC, St. Andrew’s UMC, St. John UMC, St. John’s UMC, St. Luke’s UMC, St. Mary’s UMC, St. Paul’s UMC, Seventh Street UMC, Smithburg UMC, Smithville UMC, Stephenson Memorial UMC, Stout Memorial UMC, Trinity UMC, Wayside UMC

**Midland South District Local Churches**
Aldersgate UMC, Asbury UMC, Brown UMC, Bruce McDonald Memorial UMC, Buffalo UMC, Canaan UMC, Chelyan UMC, Christ UMC, Clendenin UMC, Coal Fork UMC, Cross Lanes UMC, Dunbar UMC, East Bank UMC, Elizabeth Memorial UMC, First UMC-South Charleston, Forrest Burdette Memorial UMC, Mt. Juliet UMC, Mt. Tabor UMC, Madison UMC, Nighbert Memorial UMC, Riverview UMC, St. Andrew UMC, St. John UMC, St. Johns UMC, St. Marks UMC, St. Paul UMC, Simpson Memorial UMC, Trinity UMC, Wade Chapel, Winfield UMC

**MonValley District Local Churches**
Barrackville UMC, Blueville UMC, Boothsville UMC, Central UMC, Crim Memorial UMC, Enterprise UMC, Faith UMC, Gateway UMC, Highland Avenue UMC, Lambert’s Run UMC, Lumberport UMC, Masontown UMC, Pruntytown UMC, Reedsville UMC, Spruce Street UMC, Suncrest UMC, Tyrone UMC, Walnut Grove UMC, Warren UMC, Wesley UMC, Westover UMC

**Northern District Local Churches**
Christ UMC, First UMC, Follansbee UMC, Franklin UMC, Glen Dale UMC, New Martinsville UMC, Point Pleasant UMC, Short Creek UMC, Simpson UMC-Moundsville, Simpson UMC-Wheeling, Thomson UMC, Trinity UMC, Warwood UMC, Wellsburg UMC

**Potomac Highlands District Local Churches**
Bass UMC, Bethel UMC, Calvary UMC, Cornith UMC, Deep Creek UM Ministries, Duffey Memorial UMC, First UMC-Parsons, First UMC, Romney, First UMC-Terra Alta, Flanagan Hill UMC, Fout Memorial UMC, Grace UMC, Jane’s UMC, Jennings UMC, Kingwood Parish, Lahmansville UMC, Main Street UMC, McHenry UMC, North River Mills UMC, St. Paul’s UMC-Oakland, St. Pauls’ UMC-Ridgeley, Trinity UMC-Fort Ashby, Trinity UMC-Piedmont, Wardensville UMC, Wesley Chapel UMC, Wesley UMC-Kingwood
### Southern District Local Churches
Bland Street UMC, Bluewell UMC, Brushfork UMC, Concord UMC, Fayetteville UMC, First UMC-Beckley, First UMC-Iaeger, Gary UMC, John Stewart UMC, Mt. Hope UMC, Mt. Horeb UMC, Matheny UMC, Oak Hill UMC, Pinnacle Cooperative Parish, Rebecca Chapel UMC, St. Mary’s UMC, Trinity UMC, UM Temple

### Wesleyan District Local Churches
Beverly UMC, Bridgeport UMC, Broad Oaks UMC, Burnsville UMC, Chapel Hill UMC, Christ UMC, Copen UMC, Duff Street UMC, First UMC-Buckhannon, First UMC-Clarksburg, First UMC-Elkins, First UMC-Gassaway, Hammond UMC, Indian Camp UMC, Lost Creek UMC, Mill Creek UMC, Mt. Rupert UMC, North Elkins UM Charge, North View UMC, Otterbein UMC, St. Matthew UMC, Salem UMC, Smith Chapel UMC, Stealey UMC, Trinity UMC, UM Temple, Vincent Memorial UMC, Wayside UMC, Woodford Memorial UMC

### Western District Local Churches

### Conference Affiliated Agencies, District Offices, Institutions & Special Ministries

### Other Ministries
Africa University, Asbury Theological Seminary, Duke Divinity School, Methodist Theological School of Ohio, UMCOR World Hunger, UM Churches Outside of the West Virginia Conference, United Theological Seminary, Wellspring of Greenbrier, Inc., Wesley Theological Seminary, West Virginia Council of Churches
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Vivian F. Carne, *Rupert, WV*  
Hugh P. Dopson, *Terra Alta, WV*  
Ronald D. Eaton, *Parkersburg, WV*  
Rev. David E. Erenrich, *Wheeling, WV*  
Rev. Dr. Joseph N. Geiger, *Lewisburg, WV*  
Sidney E. Grisell, *Glen Dale, WV*  
Robert E. Haden, *Morgantown, WV*  
Sherri A. Henderson, *Huntington, WV*  
Rev. Charles E. Hicks, *Ripley, WV*  
Virginia Jackson Hopkins, *Morgantown, WV*  
Herbert S. Lambert, Jr., *Oakland, MD*  
J. Franklin Long, *Bluefield, WV*  
Ardeth L. McMillion, *Bluefield, VA*  
William Robert Nestor, *Williamstown, WV*  
Wesley Nickell, *Wheeling, WV*  
Ronald N. Roberts, *Parkersburg, WV*  
Dee Rumbaugh, *Charleston, WV*  
Rev. Dr. Gary N. Shepard, *Wheeling, WV*  
Rev. W. Brent Sturm, *White Sulphur Springs, WV*  
Jeffrey Welshonce, *Elkins, WV*

Board of Trustees and staff, November 12, 2009
*Photo by Adam Cunningham, Communications Assistant of the West Virginia Annual Conference*
Board of Trustees Committees

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Chairperson
John N. Charnock, Jr.
C. Dallas Kayser

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Chairperson
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Vivian F. Crane
Hugh P. Dopson
Rev. David E. Erenrich
Sidney E. Grisell
Sherri A. Henderson
Virginia Jackson Hopkins
Herbert S. Lambert
Dee Rumbaugh

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Robert E. Haden
Rev. Charles E. Hicks
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Delbert L. Phillips
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Patricia C. Johnston
Rev. Dr. John F. Lacaria
Ardeth L. McMillion
Rev. W. Brent Sturm

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William R. Nestor
Chairperson
Karen Sue Cartwright
Ronald N. Eaton
Ronald N. Roberts
At the United Methodist Foundation of West Virginia Inc., we take our fiduciary duty to properly protect and manage the assets of your Foundation very seriously. Presented here are the preliminary, unaudited results as of December 31, 2009, and for the year then ended.

### Financial Highlights

<table>
<thead>
<tr>
<th>Item</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Investment Funds Market Value (millions)</td>
<td>$47.90</td>
<td>$50.22</td>
<td>$42.75</td>
<td>$49.19</td>
</tr>
<tr>
<td>Total Market Value of All Assets (millions)</td>
<td>$45.49</td>
<td>$48.05</td>
<td>$43.03</td>
<td>$49.37</td>
</tr>
<tr>
<td>New Gifts, Income Gifts, and Custodial Accounts, and additions to all funds (millions)</td>
<td>$2.80</td>
<td>$2.20</td>
<td>$2.25</td>
<td>$3.07</td>
</tr>
<tr>
<td>Total Administrative Expenses (millions)</td>
<td>$0.37</td>
<td>$0.40</td>
<td>$0.43</td>
<td>$0.41</td>
</tr>
</tbody>
</table>

Number of:

- Trust Funds: 504, 446, 457, 472
- Custodial Accounts: 225, 304, 308, 329
- Income Gifts: 88, 86, 98, 110
- Total: 817, 836, 863, 911

### Total Investment Funds—By Year

![Graph showing total investment funds by year]

### How Our Assets Are Designated at 12/31/09

<table>
<thead>
<tr>
<th>Item - Description</th>
<th>Amount (millions)</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Trust Funds</td>
<td>$24.76</td>
<td>50.34%</td>
</tr>
<tr>
<td>2 - Income Gifts</td>
<td>$1.94</td>
<td>3.94%</td>
</tr>
<tr>
<td>3 - Custodial Accounts</td>
<td>$22.49</td>
<td>45.72%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$49.19</strong></td>
<td><strong>50.34%</strong></td>
</tr>
</tbody>
</table>

3 45.72%

1 50.34%

2 3.94%
Investment Advisors:
MonroeVos of Houston, TX and Birmingham, AL

Investment Managers:
Advisory Research (small-mid cap value)
Atalanta Sosnoff Capital (large cap value)
Blackrock All Cap Global
Jennison Natural Resources
NWQ Investment Management Co. (large cap value)
PIMCO Total Return III Funds (fixed income)
Tradewinds NWQ Global Investors (international equity)
Vanguard Energy Fund (natural resource/energy)

Investment Yields (net of all fees) for 2009 were:

<table>
<thead>
<tr>
<th>Fund</th>
<th>Type</th>
<th>Income Yield</th>
<th>Capital Change</th>
<th>Total Return</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund A</td>
<td>(Income)</td>
<td>4.23%</td>
<td>5.66%</td>
<td>9.89%</td>
</tr>
<tr>
<td>Fund B1</td>
<td>(Income/Growth)</td>
<td>3.05%</td>
<td>9.25%</td>
<td>12.30%</td>
</tr>
<tr>
<td>Fund B2</td>
<td>(Balanced)</td>
<td>3.15%</td>
<td>10.73%</td>
<td>13.88%</td>
</tr>
<tr>
<td>Fund B3</td>
<td>(Growth/Income)</td>
<td>3.33%</td>
<td>15.65%</td>
<td>18.98%</td>
</tr>
</tbody>
</table>

The Board of Trustees of the United Methodist Foundation has engaged the firm of Gibbons & Kawash, CPAs, to perform the annual audit of the Foundation's books and records. The 2009 audit will occur in May of 2010. Copies may be obtained thereafter from the Foundation's office or directly from our CPA firm. The audit is available in both paper and electronic format.

Foundation Offices
Jeffrey A. Taylor, President
Joyce Townsend, Accounts Administrator
Phone (304) 342-2113
C. Dallas Kayser, Treasurer
Phone (304) 675-5440

Independent CPA Firm
Gibbons & Kawash, CPAs
Valerie R. Ellis, CPA, Partner
707 Virginia Street, East
Charleston, WV 25301
Phone (304) 345-8400
Our Ministry

Our Ministry is:

To Serve
United Methodist individuals, families, local churches and Conference-related ministries

By raising, managing and distributing funds for the benefit of United Methodist causes.

We fulfill our ministry by offering:

- Flexibility
- Wide Diversification
- Reasonable Returns for a Low Fee
- Socially Responsible Investing
- Accountability
- Development Services

June, 1974, the United Methodist Charities of West Virginia Inc., now know as United Methodist Foundation of West Virginia Inc., was introduced to the Annual Conference. After the announcement, Bishop Wertz had the following words to say about leaving a legacy through your will utilizing the services of the Foundation.

If you have not already written your will, go back home and sit down with your attorney and do it. When you do it, be certain to include the United Methodist Church.

It won’t cost you a dollar. Take your pen, write into your will a provision to say:

“you know I believe in the church. I want some of the assets with which my life has been blessed to be used in such a way so that continually across the years we might minister to the children we heard about here today or to elderly folks who are at Glenwood Park home, or to the children and young people that come to our Conference centers or to those that come to our college campus.”

There’s no reason at all why we could not be a great Conference if we want to be.

Consider the possibilities of utilizing the services of your Foundation as Bishop Wertz recommended 35 years ago.
Jeanne K. Ross died February 28, 2008, but her ministry of generosity lives on! She was a generous Christian woman who loved her community and her church. She longed for a way to give back to the church that had been such a blessing to her and her late husband.

During a District event, Jeanne heard the story of how Virginia Higgins made plans prior to her death to establish a trust from her estate. Learning about Virginia, Jeanne exclaimed, “That’s what I want to do! I want to do something while I am living that will benefit the church after I am gone.” Making her plans during her lifetime, Jeanne found that she could rest knowing that the ministries she loved could continue to receive her support.

Is God calling you to leave a lasting legacy of generosity? One of the most common types of planned gifts is a bequest—a gift from your estate. Contact us and let us help you tailor your legacy gift, or feel free to use the following bequest language when meeting with your attorney:

I give to the United Methodist Foundation of West Virginia, Inc. (tax ID #55-0545643), a non-profit organization located in Charleston, West Virginia, as trustee,

   a) the sum of $__________; or,

   b) ________ percent of my estate; or,

   c) all the rest, remainder and residue of my estate, including property over which I shall have power of appointment at my passing, after all debts, taxes, expenses and other bequests have been satisfied...

   to establish a permanent endowment fund to be known as the “__________ Memorial Trust,” the income from which will be used to support the ministries of ____________ United Methodist Church (and/or the other United Methodist and Christian ministries you wish to support).
Foundation Staff

Jeff Taylor
President

Joyce Townsend
Accounts Administrator

Sally Sloan
Administrative Assistant

Kim Matthews
Associate Director

United Methodist Foundation of West Virginia, Inc.

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Charleston, WV  25301

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PO Box 3811
Charleston, WV  25338-3811

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304-342-2113  or  800-788-3746 ext. 45

Email:
info@umfwv.org

Website:
www.umfwv.org
United Methodist Foundation of West Virginia, Inc.

A 35 Year Journey

Consider the Possibilities