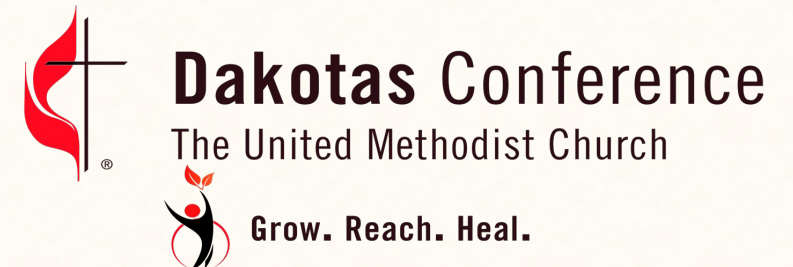
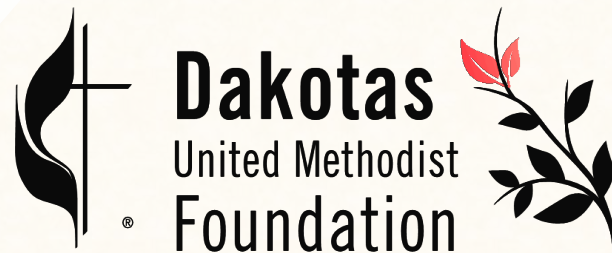


Financial Foundations

Spring 2021



Presented by...



Jeff Pospisil

Executive Director of Finance



Dakotas Conference

The United Methodist Church

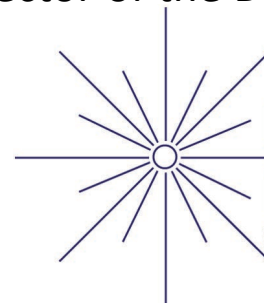


Grow. Reach. Heal.



Sheri Meister

Executive Director of the Dakotas & Minnesota Foundations



Dakotas &
Minnesota

Methodist Foundations

What if your Two Largest Givers aren't even Members

How to get the most from your

Investment and Endowment Funds



**Imagine
leaving/accepting a
gift that would
support your
ministries forever.**

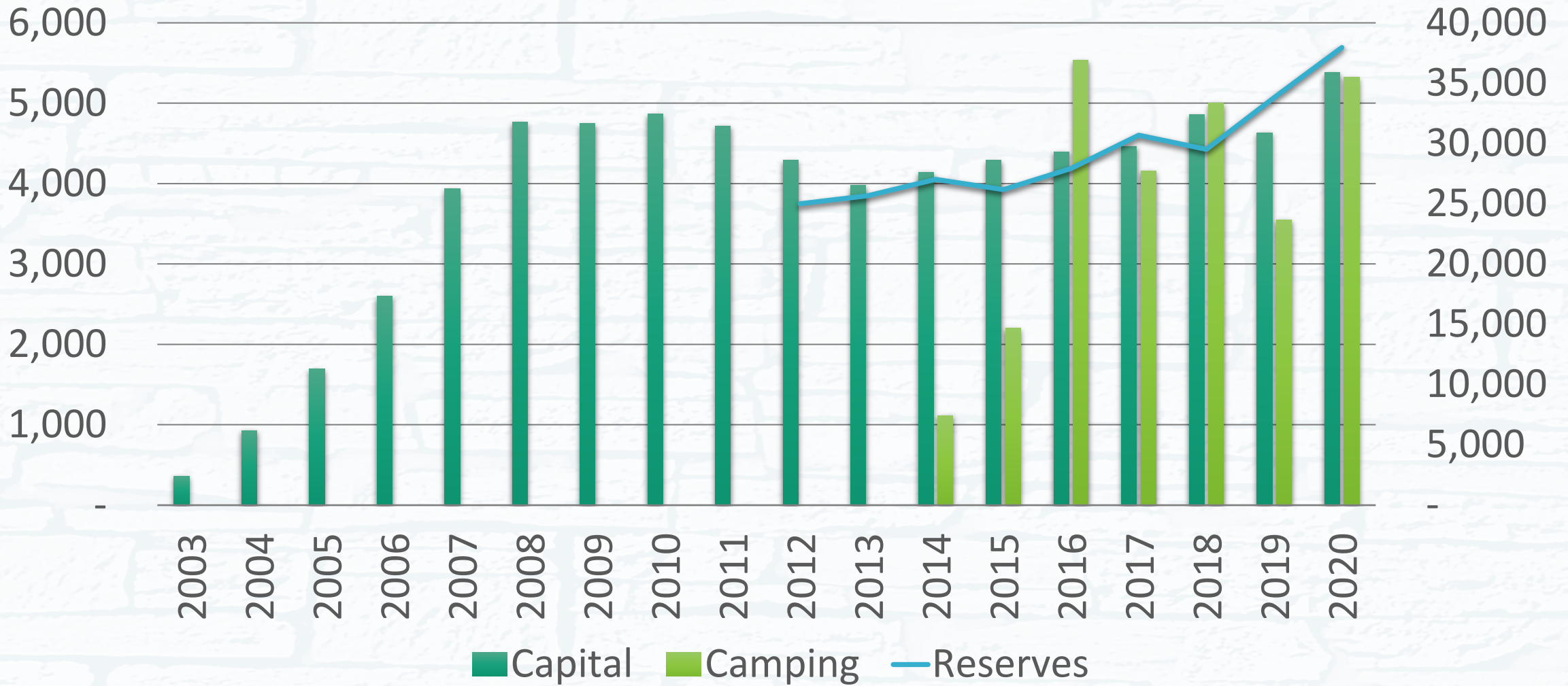


Endowment Funds

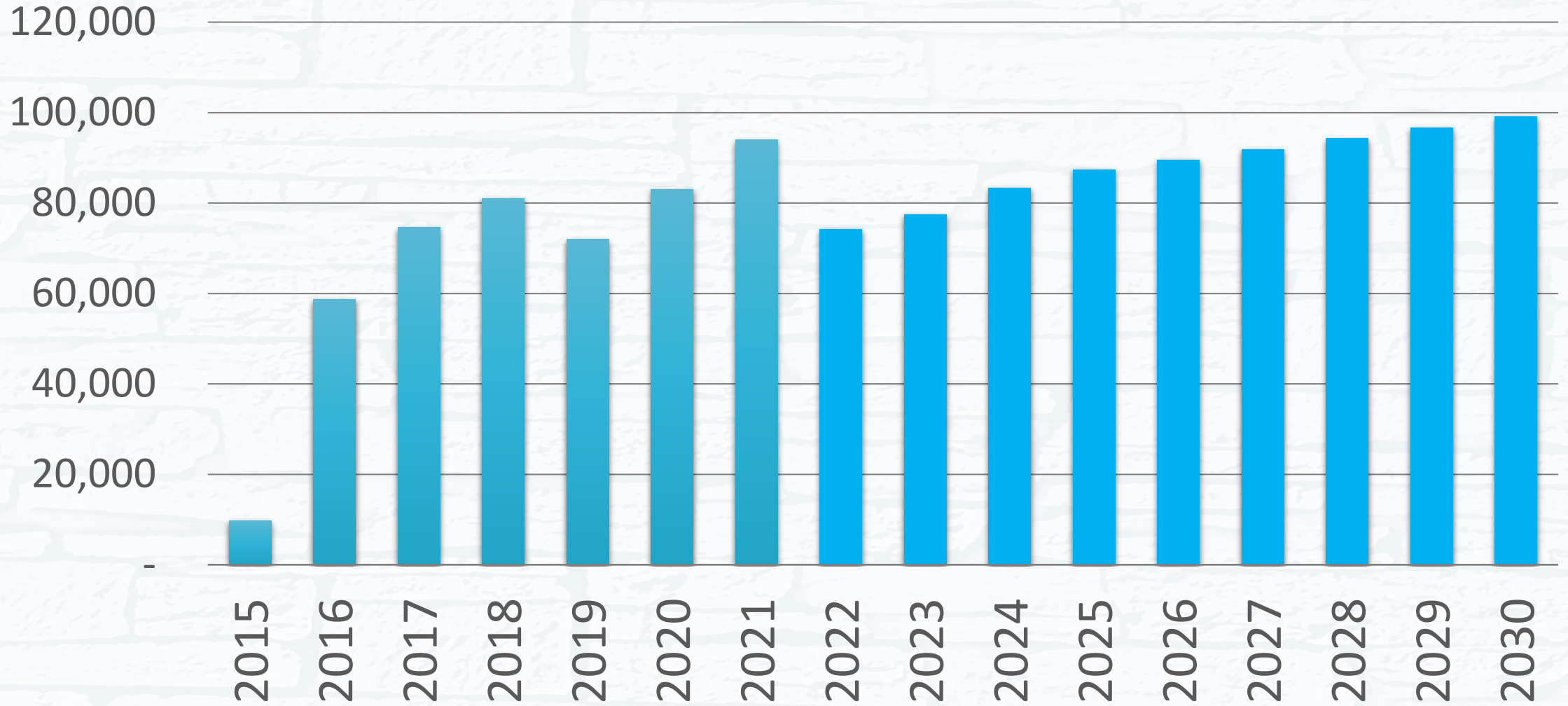
An endowment is a fund established by a foundation that makes consistent withdrawals from invested capital -

- Endowment funds are investment portfolios where the initial money is provided by donations to a foundation or organization.
- An endowment fund should have an investment, withdrawal, and usage policy governing how it is run.

Endowments & Reserves



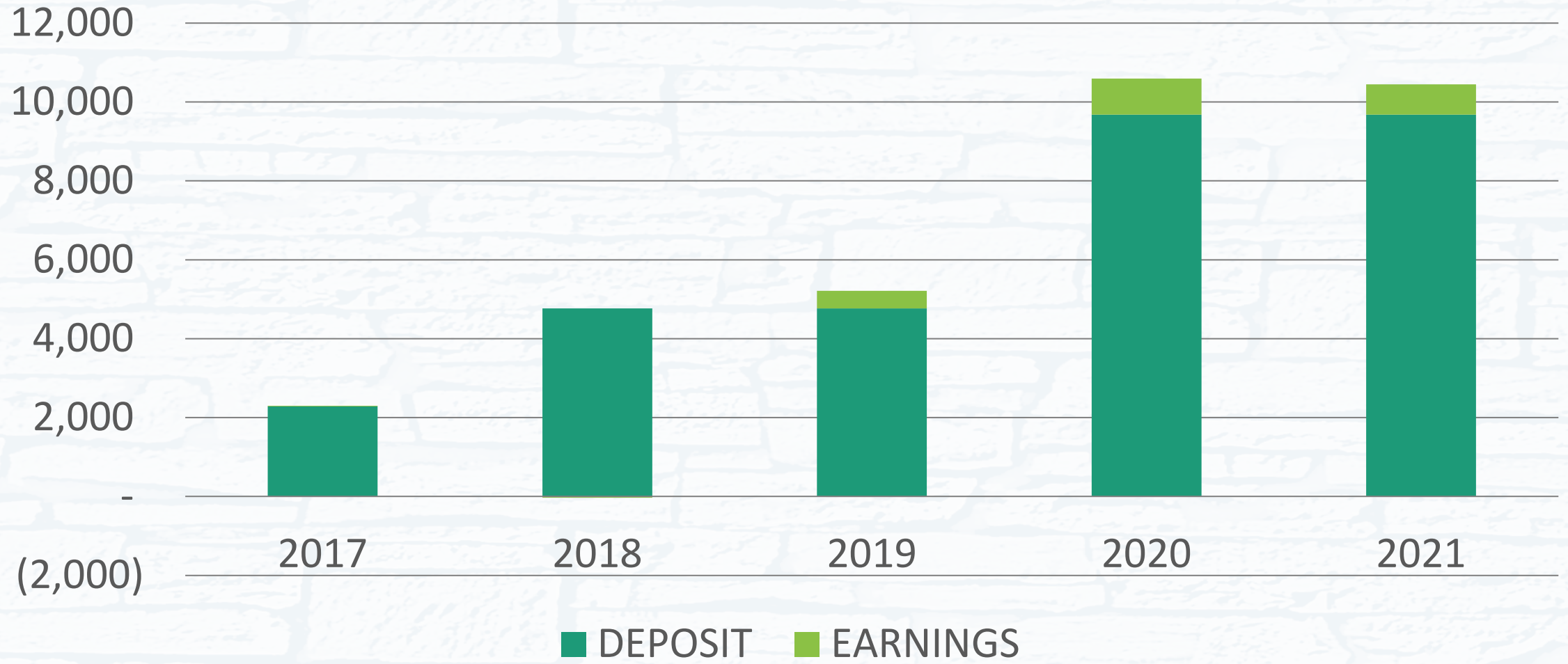
Charitable Trust → Endowment



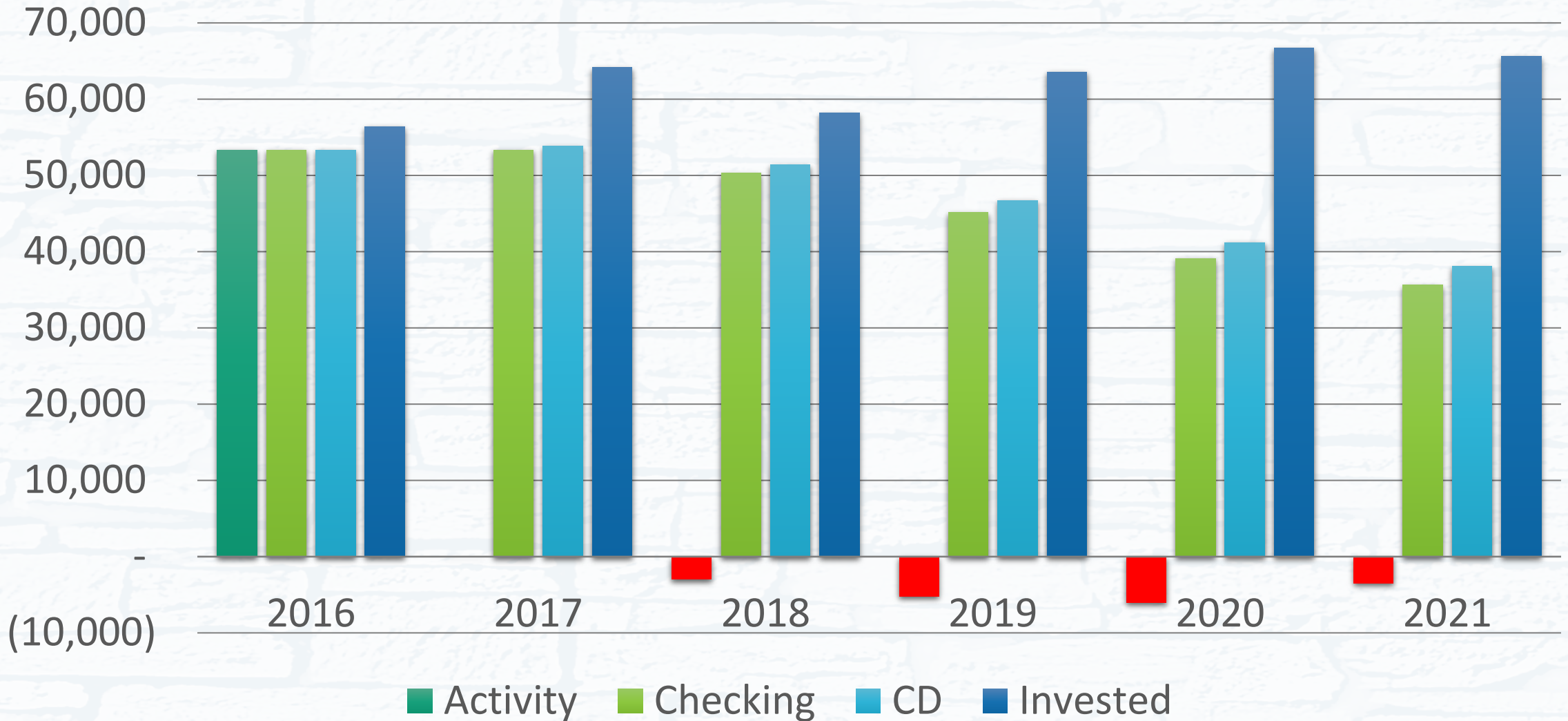
Investment Funds

- An Investment account is a fund established by your church for planned projects that support your strategic plan or vision for your church.
- It is invested the same as an endowment, but you have access to the corpus after a year of the initial investment.

Vehicle Replacement Fund



Grant for Feeding Ministry



Planning for your accounts

- ❖ Know your church culture
- ❖ Know the vision of your church
- ❖ Develop a strategy

Your Church Culture

Culture...

- represents a church's customs and attitudes.
- defines who you are.
- is never neutral; it is either permitting or limiting.
- is never status quo: your church is either becoming more generous or less generous.

Church Vision

Vision...

- Is your vision clear and compelling?
- Do you know your church's core values?
- Is your pastor's vision and the church vision aligned?

Develop a Strategy

Generosity and building for the future is less like fundraising and more like spiritual formation.

- Strategy is both informational and transformational.
- Strategy is not transactional.
- There are somethings you need to know, but information alone does not lead to transformation.

Information + application = transformation

Be prepared for a gift

Are you prepared for a large gift?

- ❖ *Gift Acceptance Policy*
- ❖ *Gift Investment Policy*
- ❖ *Gift Spending Policy*



JUST DO IT.

TAKE ACTION
NOW!



One of the greatest responsibilities churches have is the spiritual formation of their members – moving people from where they are today toward living in a way that is more consistent with the picture of the Jesus we see in the Gospels.

Chris Willard



"This book will show you a better way
to approach giving: God's way."
—Dave Ramsey



CONTAGIOUS **GENEROSITY**

Creating a Culture of Giving in Your Church

CHRIS WILLARD & JIM SHEPPARD
Foreword by Robert M.



Jeff Pospisil



Sheri Meister

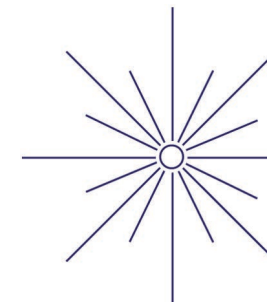


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