



Endowment Committee 2018 Annual Report

The Permanent Endowment Fund Committee is pleased to present this 2018 annual report to the congregation.

Established in 1994, the Endowment Fund is supported entirely by charitable gifts from the congregation, both lifetime and testamentary, as well as through investment of the gifts received. Its purpose is to sustain the long-term financial stability of the church, fund special needs of the church and to support programs and ministries that are not funded by the regular giving of the congregation. Fourteen endowments make up the Endowment Fund, each having its own specified purpose, ranging from providing college and seminary scholarships, improving church facilities, and supporting the church's music, youth, missions and other ministries.

Since its inception, the Committee has been focused on growing the size of the Endowment Fund to a level that would support making annual grants to fulfill its mission.

As shown in this report, the balance of the Endowment Fund has increased significantly, from \$827,000 as of Dec. 31, 2011, to more than \$3 million as of Dec. 31, 2017. This significant growth is largely due to the very generous \$1 million gift made to the Endowment Fund by Dorothy Ebersbach.

As detailed in this report, for 2017, \$82,675 was granted from the Endowment Fund to fund scholarships, to support church ministries and to make improvements to church property. Set by the Committee in the fourth quarter of each year, the 2018 spending policy has allocated up to 3 percent of the Sep. 30, 2017 fund value for distribution in 2018. This equates to a maximum distribution from the Endowment Fund of \$89,500 which is

available to support the missions of the various endowments.

The congregation's support has taken the Endowment Fund to a level that it can have a current, and lasting impact on the life and ministries of this church. We hope you find this report useful in understanding the Endowment Fund's mission and how the Committee is using the Endowment Fund to make God's love real in the life of this church.

We also hope you will consider supporting the Endowment Fund in your charitable giving and estate plans. Further information about the Endowment Fund can be found on the church's website, at: hydeparkumc.org/endowment.

Faithfully submitted,

Bradford L. Hale, Chair
The Permanent Endowment Fund Committee



Bradford L. Hale, Chair

Giving Opportunities

Q: What's the purpose of our Endowment Fund?

A: There are two primary purposes: (1) to provide a strong foundation for the long-term financial needs of our church; and (2) to fund special needs and ministries that are not funded by the annual Ministry and Missions operating budget. Endowment funds strengthen a church to empower its ministries, even in difficult times.

Q: Do I give to the Endowment Fund in addition to the annual Ministry and Missions operating budget?

A: Gifts are not viewed as a substitute for our tithes and offerings, which support the annual needs of the church. Rather, a gift to the Endowment Fund is normally made with the purpose of making a lasting impact to the sustainability of our church.

Q: What are the ways to give?

A: You may make your gift to the General Fund within the Endowment Fund, or designate your gift to a specific fund that meets a particular need (i.e. Scholarship Fund, Facilities Fund, Youth Fund, etc.). Types of gifts include cash, publicly-traded securities, closely-held securities, real property, tangible personal property, other property, bequests (wills), charitable remainder trusts, life estate gifts, life insurance, individual retirement accounts (IRAs), gift annuities and retirement plans.

Q: Can I start a new fund within the Endowment Fund?

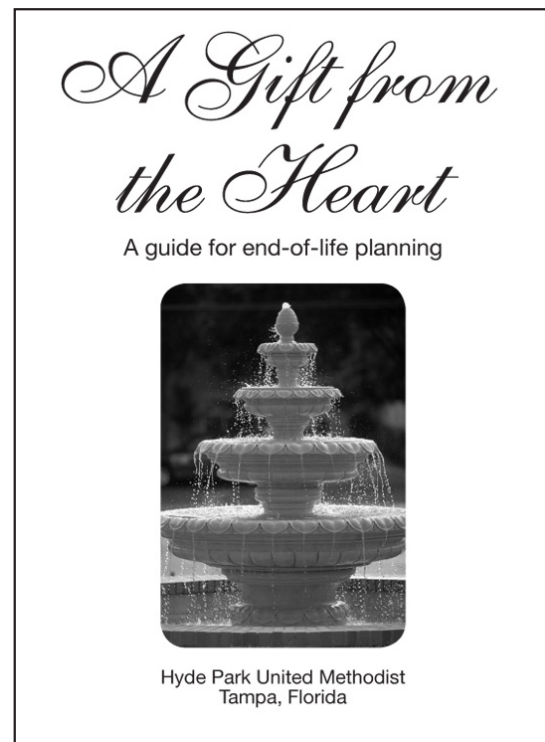
A: Certainly, but starting a new fund is not the only way to give. Any dollar amount can be contributed to the existing funds within the Endowment Fund. A contribution of \$25,000 or more is required to start a new fund, which can be named in honor of someone and its principal and earnings designated for a specific purpose at the discretion of the provider of the gift. Please contact Kim Uchimura at 813.253.5388 for additional questions.

Q: How do I find the list of established funds?

A: For a complete list of established funds, visit our website at hydeparkumc.org/endowment

Q: What if I decide to name Hyde Park in my will or estate plan?

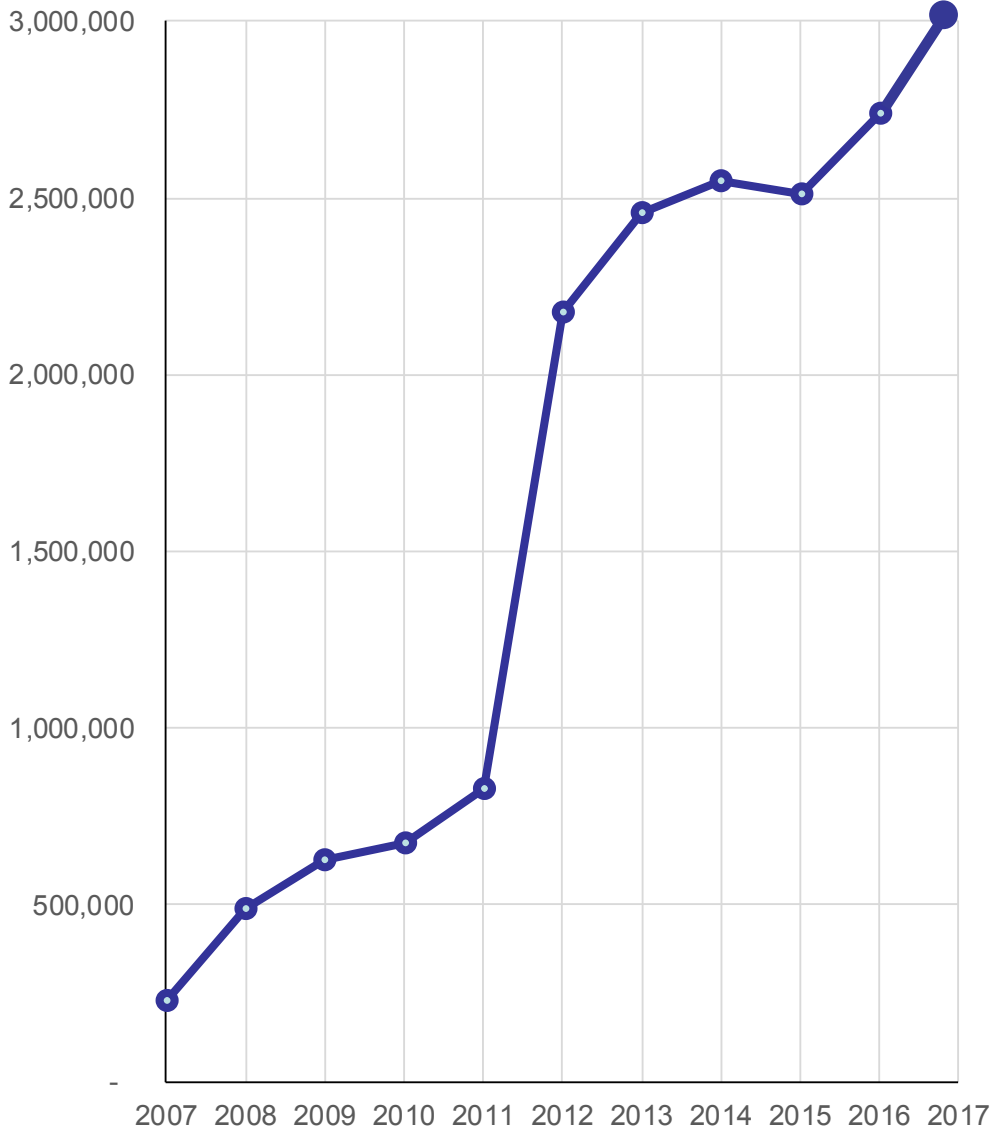
A: Please notify the church comptroller, Lynn Osborne, at 813.253.5388 and you will be considered a member of The Fountain Fellowship. The Fountain Fellowship uses the church's fountain as a symbol of gifts to the Endowment Fund that keep on giving like a fountain of life-giving water. For a complete list of established funds, visit our website at: hydeparkumc.org/endowment.



"A Gift from the Heart" Planning Guide

The Endowment Committee has prepared a booklet – "A Gift from the Heart" that contains information and forms, which serve as tools for you and your family in dealing with end-of-life issues and estate planning. Printed copies are available in the Ministry Offices or downloadable at: hydeparkumc.org/FromtheHeart

2017 Year-End Endowment Fund Balance



Year	Year-End Balance
1994	3,625
1995	4,625
1996	3,480
1997	3,480
1998	14,027
1999	46,144
2000	47,461
2001	45,584
2002	54,274
2003	65,975
2004	103,191
2005	153,933
2006	192,723
2007	231,656
2008	489,732
2009	626,529
2010	673,821
2011	827,709
2012	2,178,880
2013	2,459,924
2014	2,548,700
2015	2,509,545
2016	2,737,861
2017	3,051,065

2017 Grants from the Endowment Fund

- \$35,669 Total in scholarships to eleven undergraduate and two seminary students.
- \$35,000 Audiovisual upgrades throughout all worship venues
- \$3,369 Marble wall in Memorial Garden
- \$1,431 Grant to Mission Smiles mission partner
- \$1,600 Grant to Sun Coast Chrysalis on behalf of Youth Ministries
- \$1,459 Projector in Children's Ministries worship space



The Fountain Fellowship

The Fountain Fellowship is composed of church members and friends who have indicated to the church they have included Hyde Park United Methodist in their will or estate plan.

The church's fountain is a symbol of gifts to the Endowment Fund that keep on giving, like a fountain of life-giving water.

If you have included the church in your will or estate plans, please notify the church comptroller, Lynn Osborne, 813.253.5388, to be added to our mailing list.

"We have chosen to include the Endowment Fund in our estate plan for four reasons: (1) To glorify God; (2) We believe in this church and its positive impact on individuals, families, our community and the world at large; (3) We are blessed and need to share that blessing; and (4) To show our children and grandchildren that we believe in leaving a legacy to the church."

— George and Susan Gage

"Hyde Park's Endowment Committee connects me to the memories of my Mom and Dad who always gave a gift to their church when one of our family members died, to give thanks and to honor the memory of that individual. On a deeper level, Hyde Park has nurtured me and helped me grow my faith in so many ways, from attending weekly worship, to participating in numerous Bible studies and small groups, serving in Children's Ministries and on Nicaragua mission teams. I truly feel that I have seen the hands of Jesus reaching out to me through the love, acceptance, and support that I have received through this congregation. It is a real blessing to me to be able to support the Endowment Committee so that Hyde Park's programs, ministries, and outreach to make God's love real may continue for years to come." — Cindy Lieving



Class of 2018-2020 Endowment Fund Committee Members

2018: Robert Cleveland, Bradford Hale, Trudy Hensley, Jim Palermo

2019: Heather Elwell, Katie Tinley, John Willoughby

2020: David Allen, Chris Christenberry, Sue Nelson

Jayne Cabigas (Board of Trustees representative),
Kathy Freeman (Finance Committee representative)

Hyde Park United Methodist

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hydeparkumc.org/endowment



Third-Graders Receive Bibles, 2018