WELCOME

bienvenidos

2022

NAUMF

ANNUAL MEETING

SAN ANTONIO

Program of Events

2022

NAUMF

ANNUAL MEETING

SAN ANTONIO

AGENDA

MONDAY OCTOBER 10

10:00 am - 3:00 pm	Registration Open	4th Floor
10:00 am - 1:00 pm	Executive Committee Meeting & Lunch	Concepcion - 2nd Floor
1:30 pm - 2:45 pm	Orientation for New Members	Concepcion - 2nd Floor
1:30 pm - 2:45 pm	Comptrollers/Treasurers/CFOs	El Conde/La Condesa - 3rd Floor
1:30 pm - 2:45 pm	Stewardship /Learning Leaders	Boardroom - 2nd Floor
3:00 pm - 4:30 pm	Broadening Our Relationships *(Andy Hendren)*	Veramendi - 4th Floor
6:00 pm - 9:00 pm	**Welcome Reception & Opening Dinner**	**Biga on the Banks**

Welcome Reception - Sponsored by Stellar Technologies

Opening Dinner - Sponsored by The Humphrey-Kelly Group–Bank of America/Merrill Lynch

TUESDAY OCTOBER 11

7:30 am -10:00 am	Registration Open	4th Floor
7:30 am - 8:30 am	Breakfast	Madero - 5th Floor
8:30 am - 9:00 am	Welcome & Worship *(Bishop Robert Schnase, San Antonio Area)*	Iberian - 5th Floor
9:00 am - 10:00 am	**Dr. Sidney Williams, CEO, Crossing Capital Group**	**Iberian - 5th Floor**
10:00 am - 10:30 am	Break - Network & Connect	Iberian Foyer - 5th Floor
10:30 am - 11:30 am	Table Discussion	Iberian - 5th Floor
11:30 am - 1:00 pm	Jurisdictional Lunches	SC-Madero B, SE-Madero A - 5th Floor NC-El Conde/La Condesa, NE-San Jose, WE-Los Hidalgos - 3rd Floor
1:30 pm - 4:15 pm	Round Robin Ministry Sharing (See handout) Session 1: 1:30 pm - 2:15 pm Session 2: 2:30 pm - 3:15 pm Session 3: 3:30 pm - 4:15 pm	
4:15 pm - 4:30 pm	Wrap-up	Iberian - 5th Floor
	Open evening	

WEDNESDAY OCTOBER 12

7:30 am - 8:30 am	Breakfast	Madero -5th Floor
8:30 am - 9:00 am	Worship and Jim Argue Award Presentation	Iberian - 5th Floor
9:00 am - 10:00 am	Chris Seals, Co-Founder and CEO, Still Austin	Iberian - 5th Floor
10:00 am - 10:30 am	Break - Network & Connect	Iberian Foyer - 5th Floor
10:30 am - 11:15 am	Table Discussion	Iberian - 5th Floor
11:30 am - 1:00 pm	Lunch	Madero - 5th Floor
1:30 pm - 4:30 pm	Business Session and Adjournment	Iberian - 5th Floor
5:00 pm - 7:00 pm	Social Hour and Dinner	Madero - 5th Floor

Sponsored by Wespath

2022 HOST FOUNDATIONS

On behalf of the South Central Jurisdiction, welcome to San Antonio! We're glad you've joined us for the 2022 NAUMF Annual Meeting.

Kansas Methodist Foundation

Dustin Petz, President/CEO

Missouri United Methodist Foundation

David Atkins, President/CEO

Nebraska United Methodist Foundation

Jackie Urkoski, Executive Director

Oklahoma Methodist Foundation

Bill Junk, President

The Methodist Foundation for Arkansas

Wayne Clark, President

TMF

Lisa Greenwood, President / CEO

United Methodist Foundation of Louisiana

Chris Spencer, President

Wesleyan Investive

Lisa Greenwood, President / CEO

2022 EXECUTIVE COMMITTEE

Many thanks to each member of this year's Executive Committee for serving as faithful stewards of business matters on behalf of NAUMF.

David Bell
President

Phil Jamieson
VP & President-elect

Jeff Taylor
Treasurer

Terri Turner
Secretary

Tom Wilson
Past President

Sheri Meister
Admin/Training Focus Area Chair

Ed Bailey
Investment Focus Area Chair

David Atkins
Legal Focus Area Chair

Brian Sheetz
North Central Jurisdiction Rep

Wes Palmer
Northeastern Jurisdiction Rep

Wayne Clark
South Central Jurisdiction Rep

Rich Bowlin
Southeastern Jurisdiction Rep

Anne Green
Western Jurisdiction Rep

OPENING NIGHT

NAUMF will kick-off officially at **Biga on the Banks** Monday evening starting at 6:00 pm. The restaurant entrance is located inside the International Center. While both the hotel and restaurant are located on The Riverwalk, see the walking map below to navigate the shorter street-level route to the entrance.

6:00 pm Welcome Reception on the Terrace
Sponsored by Stellar Technologies

7:00 pm Opening Dinner
Sponsored by The Humphrey-Kelly Group – Bank of America/Merrill Lynch

BIGA ON THE BANKS

203 St. Mary's St., San Antonio, TX 78205

WALKING DIRECTIONS
From hotel, turn left (west) on College St. toward St. Mary's.
Turn left (south) on St. Mary's and continue a few blocks to Int'l Center.

San Antonio River Walk - River Bend Member Map

The San Antonio River Walk Association (SARWA) Member Map - Data pulled March 2020

EXPLORE SAN ANTONIO

We encourage you to enjoy the beauty and local culture of San Antonio!

THE RIVER WALK
Sightseeing, shopping, food, and fun. All on a world-renowned 15-mile urban waterway. The River Walk, or Paseo del Rio, is a San Antonio treasure and the largest urban ecosystem in the nation. Explore by foot along the river's walking path or jump aboard a river barge for a ride and guided tour.

NEARBY ATTRACTIONS
Explore nearby attractions like **the Alamo,** the **King William Historic District,** or the **River Walk Public Art Garden**. Shop local favorites along the river's Museum Reach at the **historic Pearl.** While at Pearl, dine and drink al fresco at The Food Hall at Bottling Department.

Further south, immerse yourself in history at our **UNESCO World Heritage Site,** and **San Antonio Missions National Historical Park,** along the Mission Reach.

San Antonio Digital Visitors Guide
https://www.visitsanantonio.com/official-visitors-guide-digital
The Alamo
https://www.thealamo.org/visit/tours-and-experiences
Narrated Riverboat Cruises
https://www.goriocruises.com/Cruises/Soul-of-San-Antonio-Narrated-Cruise
San Antonio Missions National Historical Park
https://www.nps.gov/saan/index.htm

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Partnerships Built On Trust.

United Methodist Insurance Program
Plan. Protect. Restore.

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FOUNDATION Investment Management

Look for these icons throughout to see more from our sponsors!


Stellar Technology
Solutions, LLC
Proud NAUMF Sponsor
• Advanced, secure, fully-integrated philanthropic enterprise solutions
• Partners with you to accelerate growth, mission, and impact
• Purpose built for the philanthropic fiduciary market
Proven Solutions
Clients as Partners
Business Integrity
Security Compliance

3 Steps to Accelerate Foundation Growth
Rethink, Reset and Reinvent

If the **recent challenges** have taught us anything, it is the need for philanthropic services are growing each day. Given this, it is time to find better ways to keep up with donor and grant making demands to support our mission and causes. Even the most prepared foundations are finding themselves in need of additional assistance. **Strategies vary by organization;** some are focused on short-term needs with **point solutions**. Proceed with caution, this often leads to suboptimal results adding costs and complexity, without solving the underlying problems. Others have chosen a different path with a more holistic approach. However you get there, **it is incumbent upon each of us to grow** to create a bigger impact.

How to Get There

The following 3 steps create a framework that will help you reshape your own unique path and gain an advantage to accelerate growth.

Rethink - Start with the End in Mind

Think strategically across all your business touchpoints from your donors to stakeholder constituencies on the front-end to your back-office staff and processes. Ask yourself where do I want to be? Get smart by researching and educating yourself on the possibilities. Start with the end in mind by envisioning your future state. What would my foundation look like? What are my unique strengths and differentiators? What do I need to change?

Reset - Tear Down the Silos & Untangle the Data

Foundations are often trapped in a myriad of dated and/or siloed technologies that do not communicate with each other, and each having its own database. It is difficult to track and untangle the data duplicated many times in databases, data repositories and spreadsheets throughout the organization. While these siloed, individual components may appear to be less expensive, or at least less expensive when you purchase them, total cost of ownership mounts over time and is normally higher due to complexities and redundancies in the systems. Take an inventory and do a gap analysis of your systems, capabilities, capacity, redundancies, business requirements, then look to simplify, automate, and...

Reinvent - Build from a Core Enterprise Platform

No matter what markets and causes you serve, core enterprise solutions built with deep domain expertise are historically faster, smarter, more agile and a better fit for your overall organization. Find a purpose-built, web-based enterprise Philanthropic Fiduciary solution that fits your business vision. A solution that provides a 24x7, personalized client and constituencies experience, participant accounting for subaccount transaction processing with daily NAV, unitization, rebalancing, financial services levels of security, real-time analytics reporting. Look for a vendor with deep Philanthropic Fiduciary experience that has successfully done this many times and can partner with you to future proof your organization.

Go Ahead...

Reinvent to accelerate growth focusing on donor, mission, and impact. Start today to **rethink** with the end in mind. **Reset** to untangle your data and systems. There is a clear path forward. It is up to you to take those first steps.

GLOBAL INSTITUTIONAL CONSULTING

What sets us apart

Our value proposition

Bank of America's Global Institutional Consulting (GIC) group is passionate about helping institutional clients reach their goals and improve the lives of others. We put the resources and thought leadership of the enterprise to work in our clients' best interests by delivering customized, objective advice and robust investment solutions aligned to their goals, through an experienced, credentialed Global Institutional Consultant.

Our breadth of global resources and expertise allows us to work with you to offer a full spectrum of integrated institutional investment solutions based on your objectives, within an intimate client-consultant relationship, designed to help our clients to fulfill their mission.

What institutional clients need	What Global Institutional Consulting provides access to
• Objective perspective, advice and a customized approach that are integrated with their organizations' goals • An understanding of their unique needs, objectives and preferences through a robust discovery process • Consultants who provide access to advice driven by the client's objectives and award-winning research[1]	**Objective advice and guidance** • Advice and guidance that are driven by award-winning research[1] and a due diligence process provided through BofA Global Research and Bank of America Corporation's Chief Investment Office • Diagnostic analysis to help determine a client's needs and provide the full depth and breadth of the enterprise's global resources • Determination of the appropriate level of engagement and oversight to help clients focus on their business priorities and fiduciary responsibilities • Flexibility to choose and adjust an investment menu based on an open investment architecture and aligned to an organization's specific goals and objectives
• Broad array of customizable product and potential institutional investment solutions to help meet their unique needs • Assistance meeting spending objectives and helping to manage risk without compromising principles • Access to resources, specialists and institutional research not normally available from smaller firms	**Institutional investment solutions** • Customized investment solutions that fit in the institutional space and provide a depth of products and solutions that are focused on the client's needs • Access to institutionally focused investment managers, development of investment policy statements, spending policy analysis, liability modeling and risk management • Access to Bank of America Corporation's Chief Investment Office's detailed analytics, targeted reports and thought leadership that provide extensive insight to help inform investment strategies

What institutional clients need	What Global Institutional Consulting provides access to
• Global Institutional Consultants who understand clients' needs and offer advice and guidance to help them make decisions across investment committees • An experienced Global Institutional Consultant who understands capital markets, can provide insights on market events and can help eliminate emotional decisions • Assistance in fulfilling their fiduciary responsibilities and managing risk effectively	Experienced, credentialed Global Institutional Consultants • Average 22 years of overseeing clients' assets ranging from $10 million to $4 billion as of March 2022. • Management of a focused book of business that is aligned to institutional client segments • Hold advanced professional credentials such as CIMA® or CFA® designations and complete rigorous internal accreditation requirements • Combination of global resources and strong local consulting teams that deliver boutique-like service with access to the enterprise's broad capabilities and specialized institutional professionals

[1] *Institutional Investor* magazine announced BofA Global Research as one of the Top Global Research Firms in 2021 based on surveys held throughout the year. The magazine creates rankings of the top research analysts in a wide variety of specializations, drawn from the choices of portfolio managers and other investment professionals at more than 1,000 firms. BofA Global Research is research produced by BofA Securities, Inc. ("BofAS") and/or one or more of its affiliates. BofAS is a registered broker-dealer, Member SIPC, and wholly owned subsidiary of Bank of America Corporation. For more information, visit Institutional Investor. Rankings and recognition from Institutional Investor are no guarantee of future investment success and do not ensure that a current or prospective client will experience a higher level of performance results and such rankings should not be construed as an endorsement.

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2022 JIM ARGUE MEMORIAL AWARD

THE AWARD

James B. "Jim" Argue Jr. was a dedicated United Methodist pastor and public servant. Before becoming the longest-serving president of the United Methodist Foundation of Arkansas, he spent 18 years in public service with the Arkansas State Legislature, largely advocating for effective educational reform to better serve the whole community.

Jim passed away May 3, 2018 as “committed, tenacious, and unwavering in his successful efforts towards major school reforms and improvements. Whether it was education, healthcare, or families facing poverty and food insecurity, Jim could be relied upon to create or support greater opportunities for all children.”

Jim Argue was a beloved member of NAUMF for many years due in part to his tireless efforts to make the world a better place. A few years ago, NAUMF chose to honor his life-long contributions by awarding a worthy nonprofit with a group donation made in his memory. This year’s recipient shares Jim’s heart for serving others and his appreciation for the power of education.

THE RECIPIENT

Magdalena House is a neighborhood of transitional homes in San Antonio that serves mothers and their children who have fled dangerous and abusive lives. Utilizing a dual-generation approach, we provide safe shelter, basic needs, educational programming, and therapeutic services.

The mothers who come to us seek safety, healing, and hope for a new beginning for themselves and their children. Magdalena House empowers these families to transform their lives. Mothers must participate in accredited education such as ESL, GED, or college. Families stay with us for several years until the mothers complete their educational goals. Families rediscover forgotten strength and develop new skills to help them flourish. During their time at Magdalena House, families participate in counseling, parenting programs, life enrichment classes, financial planning, spiritual formation, and compassionate community living. Children thrive in this stable, loving environment. Mothers develop the social, educational, and financial skills needed to ensure physical, economic, and spiritual well-being for themselves and their families.

We began with a single home and have since purchased and developed our property into a five-acre gated neighborhood, opened two new homes and Family Wellness Center, and have refurbished our original home. Our future includes an Empowerment Center for resident services and 3 additional homes.

www.**MagHouse**.org

Congratulations to 2022
Jim Argue Memorial Award Recipient

Magdalena House

FEATURED SPEAKER

Rev. Dr. Sidney Williams

CEO, Crossing Capital Group

For more than thirty years, Rev. Dr. Sidney S. Williams, Jr. has led diverse efforts to provide access to capital to marginalized communities. In 1990, he was the first graduate of the Howard University School of Business to be recruited by Goldman Sachs. While employed on Wall Street, he advised c-suite level executives of Fortune 500 companies in a variety of industries. In 2008, Dr. Williams pioneered a collaborative model for social impact, F.I.S.H., providing access to capital for anchor institutions serving marginalized communities. Most recently he served as the interim Chief Financial Officer of the Interdenominational Theological Center in Atlanta, Georgia.

Dr. Williams is recognized as a visionary and as a transformational leader among community stakeholders and financial institutions. He currently serves as an independent director for Valley National Bank as well as advises several non-profit organizations, privately held middle-market companies and start-up ventures. Dr. Williams' scholarship is focused primarily on an interdisciplinary approach to understanding how theological and marketplace frameworks interact — and more significantly, how they should interact. He has published dozens of articles and two books - *Morning Meditations: 100 Days to Believing You're Successful* and *Fishing Differently: Ministry Formation in the Marketplace*. In addition to serving as CEO of the Crossing Capital Group, Dr. Williams is also currently pastoring the Bethel Church of Morristown, New Jersey.

FEATURED SPEAKER

Chris Seals

Founder / CEO, Still Austin

Chris Seals has lived all over Texas. He moved to Austin in 1993 and fell in love with the beauty, creativity, and inclusiveness of the city. For most of his career Chris worked as an economist in sustainable development prioritizing efforts to protect the environment.

In 2013 his father approached him with the idea of opening a whiskey distillery together. While he liked the idea of opening a whiskey distillery, he loved the idea of building a closer relationship with his dad. Together with his father and others, Seals co-founded Still Austin Whiskey Company with a vision to make a bourbon whiskey that is a genuine expression of the spirit of Austin, Texas.

Today, the distillery operates a zero-waste facility that donates spent grains back to farmers to feed their cattle, and it reuses water to maximize energy efficiency. Still Austin also carries a firm commitment to support local farms by purchasing 100% of grains from Texas farmers.

Seals grew up in a family that valued creative expression, excellence, and individuality. That commitment to excellence and individuality can be seen in Still Austin's one-of-a-kind 42-ft tall Scottish-made still, which is the only of its kind in North America. Still Austin also uses a rare and labor-intensive process of slow water reduction while the barrels of bourbon mature. The process is a labor of love that few distilleries choose to undertake - but results in the highest quality of spirit.

Giving back is also in Seals' and Still Austin's DNA. Chris is active in the company's support of the community with everything from emergency assistance (hand sanitizer, supplying water during the big freeze, etc.), to charitable giving of several local organizations like the Health Alliance for Austin Musicians (HAAM). Additionally, he's always willing to assist other Founders and CEOs gain access to capital.

Funding Ministry is growing increasingly complex.

So is underwriting faith-based loans.

Horizons' Next Level Generosity approach to growing generous and sustainable churches and faith-based nonprofits is an **integrated year-round strategy** focused on meeting annual, capital, and planned giving funding needs, while growing engaged disciples. Horizons' clients, on average, see double-digit growth in annual giving.

Horizons' Capital Funding Model is unique in that prior to conducting feasibility studies, we guide churches in a pre-campaign development process to clarify vision, align ministry and financial leaders, and grow lead gifts. Horizons' feasibility studies and Next Level Generosity Assessments then create a clear picture of both capital-giving potential and ministry sustainability for church leaders and their lending partners.

Digital Magazine

"We have entered a season where episodic and siloed annual, capital, and planned giving efforts are failing to produce the results needed by our faith-based communities."

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The Generosity Advantage

Since 2009, the American economy has enjoyed a season of tremendous growth and prosperity. The stock market increased by a whopping 524%, interest rates remained stable and largely at historic lows, inflation averaged a scant 1.8%, and Americans increased charitable giving by over 36%.

2022 has ushered in a new season marked by high levels of inflation and the largest rise in interest rates in over 20 years aimed at slowing economic growth. The Federal Reserve Bank has warned to expect more increases. The stock market has lost significant ground since the beginning of the year in response to this changing financial landscape. I am encouraging all church leaders to educate themselves on the impact these changes will have on your ability to fund ministry in 2022 and beyond.

Here are a few key points that you should be focused on:

- Simply doing what you did last year is already costing more in 2022. Prices are increasing at a rate of 4.6 times faster than over the last 12 years.
- Giving will need to increase by more than 8% this year, at the current rate of inflation, just to maintain the same level of ministry you provided in 2021.
- If your church has debt, when your interest rate adjusts, you will experience the double bind of higher debt payments on top of rapidly increasing ministry funding costs.
- While the amount Americans give continues to climb, churches experienced decline in inflation adjusted dollars in the last reported giving period of 2020. Over the last 50 years, the percentage of Americans giving to religion has fallen by half, and the pace of decline is growing each year primarily because our most capable donors are shifting more of their giving to organizations they perceive are more effective.
- In response, leaders need to identify and implement a reliable year-round generosity development strategy to grow ministry funding by 10% or more in the coming year to ensure you remain on sound financial footing.

In most cases, when a church in financial crisis engages Horizons to guide them to a solution, the underlying issues were both identifiable and predictable in a season when the church had the time and financial resources to avoid the crisis.

Now is the time to look at your financial health. Doing so will allow you to plan and adjust to the rising ministry costs without taking aggressive cost-cutting measures.

By scanning the QR code you can read the pages of our new magazine, The Generosity Advantage. We hope it will spark new ideas and help you ask better questions about how you can fund more ministry and grow more disciples.

HOW TO BENEFIT FROM DENOMINATIONAL DISRUPTION

Disruptions are never easy. Most people prefer the known versus the unknown. Most people prefer to use the same processes and procedures instead of having to develop new ones. Hardy Reed gets that, but we have found that disruptions also present us with some great opportunities for growth. If we were just a money manager like most firms that want your business, then that might not be true. But Hardy Reed is more than a money manager. We are a fiduciary management firm that deals in investments. As such, Hardy Reed helps our clients create Definable, Defendable, and Repeatable processes that keep foundations on the right track no matter what is going on in their world.

United Methodist Foundations are clearly dealing with a generational disruption that may split the denomination. What does that mean to your current church clients? What does that mean to the growth of your Foundation?

One United Methodist Foundation we work with has seen a lot of growth during this time of denominational disruption. What are they doing that is different? They worked hard to get their CEFEX certification. They learned that while most consultants focus on manager selection, a best of class fiduciary process will focus an investment committee on the parts of their process that really matter to their long-term success. Although manager selection is important, according to the Center for Fiduciary Studies, in the hierarchy of investment decision-making it comes in a low 7th in importance to other factors often not addressed by investment committees. A CEFEX Certified foundation must prove its use of and compliance with fiduciary best practices every year. CEFEX Certification keeps your foundation on track.

The Center for Financial Planning & Investments studied the fi360 Fiduciary Score® and found that funds scoring in the top quartile (green) provide, on average, higher future investment returns, reduced risk, and more consistency compared to other funds. It appears that Best Practices produce better results.

One potent example of how a fiduciary process can make a difference happened this past year. A key fiduciary duty is to only pay reasonable costs, which can be hard to analyze. You are required to know ALL of your investment related expenses and how those costs compare to your peers. Hardy Reed helped a United Methodist foundation complete a request for proposal. Two often used investment advisors within the UMF circle competed. Both investment advisors proposed fees were more than double the amount of the winning nationally recognized investment advisor. A fiduciary best practice is to review fees every year to ensure and document that you are paying reasonable fees for the services you receive.

Your foundation can thrive in periods of disruption by implementing fiduciary best practices. As a CEFEX Certified firm for the past eleven years, Hardy Reed's goal is to help you by:

- Increasing retention and acquisition of church clients
- Showing stronger investment returns
- Improving fiduciary governance
- Reducing liability
- Lowering investment costs

United Methodist Insurance Program

Plan. Protect. Restore.

Ask The Expert: Cyber Security

From the UMIP Church Protection Connection monthly newsletter

Churches are a safe place for your congregation – spiritually and physically. But there are dangers. Your church's cyber space is one place bad people want to invade.

It only takes one, often unintentional, click to expose your church to ransomware and other threats to your cyberspace. To protect your church, make sure all people who use the church's desktops, tablets, and mobile devices follow a few simple procedures. Here are some basic steps you can take to help protect your church from cybercrimes.

- Realize phishing is the number one attack vector for the distribution of malware. You will get an email, a text message or even a Facebook message asking you to click on a link or open an attachment.
- You can get infected if you go to a questionable website or a website that has been infected with malicious code (This is called drive-by malware).
- Make sure your computer/smartphone/device is updated to the latest operating system and all applications are patched. Do not ignore your device when it says it needs to be updated.
- Reduce your attack surface on your device. Only allow trusted applications to run on your device. Beware of all the free software products that you never use. (This is called application whitelisting).
- Reduce admin rights for users. Admin rights allow users to install programs and malicious code. If your device asks you to enter your password to install or make changes to a program, you need to be careful.
- Take an inventory of who you are allowing onto your network and what they can access. Does the employee from three years ago still have Admin rights to your network? You do not want every employee to access everything on your network.
- Use two factor authentication on all remote access to your network, especially remote desktop protocol (RDP).
- Backing up is not enough ... make sure you test your backups and have a good restoration plan. Remember, if your network is infected with ransomware there is a good chance the Cybercriminals have also stolen your data.
- Educate yourself and your staff about the dangers of Ransomware and Cybercrime.
- Contact your local FBI Office if you are a victim or go to WWW.IC3.GOV

In addition, visit this helpful resource from the Department of Homeland Security's Cybersecurity, and Infrastructure Security Agency (CISA): www.cisa.gov/uscert/ncas/alerts/aa21-131a.

When's the best time to educate your church members on cyber security? Now. Whether you've never done this or did it two months ago, the ever-changing landscape of cybercrimes means we all must remain constantly vigilant to protect our people, our property, and our finances.

For more information on complete insurance coverage for your church or for answers on other insurance-related questions you may have, call us at 484-654-3380. Look for a free no-obligation quote? We've got you covered. Visit www.uminsure.org/request-a-quote-form and fill out our handy form, and we'll be in touch!

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Wespath Institutional Investments
1901 Chestnut Avenue
Glenview, IL 60025-1604
Phone: 847.866.4100
wespath.com

How to Determine the Optimal OCIO Provider for You

What Is an OCIO?

An Outsourced Chief Investment Officer, or "OCIO," is a service provider that performs investment management-related functions on behalf of its clients. This can include overall investment strategy implementation, asset allocation, investment manager selection and operation management. In a more traditional investment model, organizations are responsible for these investment functions, often performing them in-house. By contrast, the OCIO model sees third-party providers taking on many of investment decision-making responsibilities typically handled by an investment committee.

Organizations often choose the OCIO model to help cut costs, improve their investment program's oversight and governance, benefit from their provider's scale, and free up capacity to be redeployed in other areas of their business.

Interest in OCIO Services Is Growing

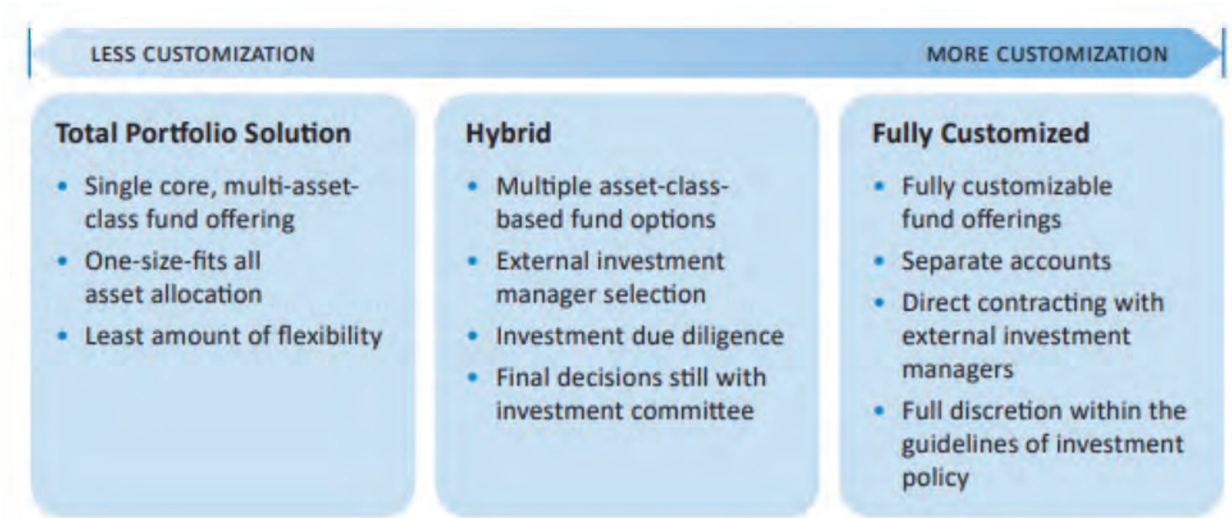
The OCIO model is gaining in popularity as more investment committees come to understand that having an investment partner that operates in a fiduciary capacity can increase the effectiveness of their investment programs. In addition, many organizations—especially those in the faith-based, not-for-profit world—do not have the resources to dedicate to complex investment decisions. An OCIO partner typically has a full investment team that can help with the involved tasks of an investment program, such as investment due diligence, governance and operational risk management. This gives organizations more time to focus on their missions.

Choosing an OCIO

Once an investment committee chooses to pursue the OCIO model, they must decide what "level" of OCIO services will address their investment needs. OCIOs exist in many forms, ranging from global banks and consultants to more boutique, niche providers. Each OCIO offers different options in terms of customization and breadth of service. There are three main OCIO offerings: Total Portfolio Solution, Fully Customized and Hybrid.

Wespath

INSTITUTIONAL INVESTMENTS



Investment committees must select the OCIO solution that is right for their organization. It is important to define specific investment goals and think about what functions benefit most from outsourcing. Committees may also consider whether their own mission aligns with that of the OCIO.

Contact Us

If your United Methodist-related organization is considering switching to an OCIO model or changing its OCIO provider, Wespath Institutional Investments may be an option. To learn more about our services, please visit our website or email us at investmentinfo@wespath.org.

2022 NAUMF ATTENDEE LIST

Foundation or Organization	First Name	Last Name	Job Title	Email Address
Alabama-West Florida United Methodist Foundation	Terri	Turner	Executive Director	terri@alwfumf.org
California-Nevada United Methodist Foundation	David	Malloy	Executive Director	davidm@canvumf.org
Dakotas and Minnesota Methodist Foundations	Diane	Weller	Director of Foundation Relations	diane.weller@dkmnmf.org
Dakotas and Minnesota Methodist Foundations	Sheri	Meister	President/CEO	Sheri.meister@dkmnmf.org
Desert Southwest United Methodist Foundation	Anne	Green	Executive Director	agreen@dsumf.org
Desert Southwest United Methodist Foundation	Judith	Smith	Gift Planning Officer	jsmith@dsumf.org
Discipleship Ministries	Ken	Sloane	Director, Stewardship & Generosity	ksloane@umcdiscipleship.org
Florida United Methodist Foundation	Pamela	Hicks	VP Finance and Administration	phicks@fumf.org
Florida United Methodist Foundation	Ed	New	President	enew@fumf.org
Holston Foundation	Paul	Bowman	President	pbowman@holstonfoundation.org
Holston Foundation	LeRae	Collins	Director of Communications	lcollins@holstonfoundation.org
Holston Foundation	Richard	Edwards	Director of Stewardship	redwards@holstonfoundation.org
Holston Foundation	Sarah	Spaulding	Grant Manager	sspaulding@holstonfoundation.org
Iowa United Methodist Foundation	Katharine	Yarnell	Executive Director	Katharine.yarnell@iumf.org
Kansas Methodist Foundation	Tyler	Curtis	Chief Development Officer	tyler@kansasmethodistfoundation.org
Kansas Methodist Foundation	Dustin	Petz	President & CEO	dustin@kansasmethodistfoundation.org
Kentucky United Methodist Foundation	David	Bowles	President	dbowles@kyumc.org
Kentucky United Methodist Foundation	Ginny	Bowles	Spouse/Guest	vbowles@twc.com
Methodist Foundation of Mississippi	John	Branning	Executive Director	john@methodistfm.org
Methodist Foundation of Mississippi	Todd	Marion	Associate Director/CFO	todd@methodistfm.org
Methodist Foundation of North Alabama	Michael	O'Kelley	Executive Director	mokelley@na-umf.org
Methodist Foundation of Ohio	Brian	Sheetz	Executive Director	brian@eoumf.org
Methodists Helping Methodists Foundation	Kristi	Kinnison	Executive Director	kristi@mhmfn.org
Mid Atlantic United Methodist Foundation	Frank	Robert	Associate Director Education	Frankrobert.mafoundation@gmail.com
Mid-Atlantic United Methodist Foundation	Jack	Brooks	Executive Director	jackbrooks.mafoundation@gmail.com
Mid-Atlantic United Methodist Foundation	Tracy	Brown	Operations Manager	Tracybrown@midatlanticfoundation.org
Mid-Atlantic United Methodist Foundation	Annabel	Lusardi	Assistant Director - Customer Care	annabel@midatlanticfoundation.org
Missouri United Methodist Foundation	DAVID	ATKINS	President / CEO	datkins@mumf.org
Missouri United Methodist Foundation	Laura	Murphy	Director of Development	lmurphy@mumf.org
Oklahoma Methodist Foundation	Darrell	Cates	Director of Conference and Church Relations	dcates@okumf.org
Oklahoma Methodist Foundation	Alan	Herndon	Director of Gift Planning	aherndon@lastinggood.org
Oklahoma Methodist Foundation	Billy	Meade	Controller & Treasurer	bmeade@lastinggood.org
Oklahoma Methodist Foundation	Mike	Wiley	Senior Advisor	mwiley@okumf.org
Oklahoma Methodist Foundation	Julie Ann	Wiley	Spouse/Guest	jm.wiley@att.net
Preachers' Aid Society	Wesley	Palmer	Executive Director	wpalmer@preachersaid.org
South Carolina United Methodist Foundation	Robert	Vincent	President	bobv@scumf.org
Texas Methodist Foundation	Derek	Casteel	Director of Investment Services	dcasteel@tmf-fdn.org
Texas Methodist Foundation	Dorena	Geary	VP of Operations	dgeary@tmf-fdn.org
Texas Methodist Foundation	Justin	Gould	VP of Foundation Relations	jgould@tmf-fdn.org
Texas Methodist Foundation	Lisa	Greenwood	President	lgreenwood@tmf-fdn.org
The Methodist Foundation for Arkansas	Amy	Anderson	Northwest Arkansas Development Officer	aanderson@methodistfoundationar.org
The Methodist Foundation for Arkansas	Wayne	Clark	President and CEO	wclark@methodistfoundationar.org
The Methodist Foundation for Arkansas	Lynn	Kilbourne	Director of Development	lkilbourne@methodistfoundationAR.org
The Methodist Foundation for Arkansas	Clarence	Trice	Senior VP and CFO	ctrice@methodistfoundationar.org
The Methodist Foundation for Arkansas	Kimberly	Trice	Spouse/Guest	kjtrice23@yahoo.com
UM Foundation for Tennessee/Western Kentucky	Philip	Jamieson	President	phil.jamieson@umfmtc.org
UM Foundation of Pennsylvania	Joseph	Patterson	Dean, Foundation School of Leadership, UMF of PA	jpatterson@umfoundation.org
UMF West Ohio	Susan	Black	Executive Director	sblack@wocumc.org
United Methodist Communications Foundation	David	Jamieson	Executive Finance Director	djamieson@umcom.org
United Methodist Foundation for Communications	Greg	Cox	Lead Pastor	greg.cox@wpaumc.org

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Foundation or Organization	First Name	Last Name	Job Title	Email Address
United Methodist Foundation of Indiana	Tamara	O'Neal	Loan Officer	toneal@umfindiana.org
United Methodist Foundation of Indiana	D.	Shettle	President	mshettle@umfindiana.org
United Methodist Foundation of Louisiana	Chris	Spencer	President	chris@umf.org
United Methodist Foundation of Michigan	Marian	Coles	Sr. Director of Operations	marian@umfmichigan.org
United Methodist Foundation of Michigan	David	Bell	President & Executive Director	david@umfmichigan.org
United Methodist Foundation of Michigan	Sherry	Parker-Lewis	Sr. Director Church Relations	sherry@umfmichigan.org
United Methodist Foundation of Michigan	Gary	Step	Senior Director of Leadership Development	gary@umfmichigan.org
United Methodist Foundation of New England	Ted	Crass	President	tcrass@umfne.org
United Methodist Foundation of Pennsylvania	Donald	Bailey	Executive Director	Ebailey@umfoundation.org
United Methodist Foundation of Pennsylvania	Barbara	Bower	Board Chair	info@umfoundation.org
United Methodist Foundation of Pennsylvania	Jody	Cratty	Staff Accountant	jcratty@umfoundation.org
United Methodist Foundation of Pennsylvania	Michele	Jury	CFO	mjury@umfoundation.org
United Methodist Foundation of Pennsylvania	Molly	Raraigh	Administrative Assistant	mraraigh@umfoundation.org
United Methodist Foundation of Pennsylvania	Julie	Smith	Sr. Account Relationship Manager	jsmith@umfoundation.org
United Methodist Foundation of the Northern Illinois Conference, Inc.	Carolyn	Cook	Executive Assistant	ccook@umfnic.org
United Methodist Foundation of the Northern Illinois Conference, Inc.	Chris	Walters	President	cwalters@umfnic.org
United Methodist Foundation of West Virginia, Inc.	Kim	Matthews	Vice President	kimmatthews@umfwv.org
United Methodist Foundation of West Virginia, Inc.	Jeffrey	Taylor	President	jefftaylor@umfwv.org
United Methodist Foundation of West Virginia, Inc.	Mary	Taylor	Spouse/Guest	maryctaylor1960@gmail.com
United Methodist Foundation, Inc. North Carolina	Rich	Bowlin	CEO	rbowlin@umfnc.org
United Methodist Foundation, Inc. North Carolina	Nick	Keller	Controller	nkeller@umfnc.org
United Methodist Foundation, Inc. North Carolina	Ivanna	Cole	Chief Financial Officer	icole@umfnc.org
United Methodist Foundation, Inc. North Carolina	Lynn	Benson	Director of Legacy Giving	lbenson@umfnc.org
United Methodist Foundation, Inc. North Carolina	Courtney	Austin	Spouse/Guest	courtney.austin@sim.org
United Methodist Frontier Foundation	Ellen	Knudsen	Executive Director	eknudsen@umff.org
United Methodist Higher Education Foundation	Robert	Fletcher	President/CEO	bfletcher@umhef.org
United Methodist Stewardship Foundation of Greater New Jersey	Brian	Roberts	Executive Director	broberts@gnjumc.org
Virginia United Methodist Foundation	Bo	Bowden	President	Bobowden@vaumc.org
Virginia United Methodist Foundation	Brad	Duty	Foundation Services Advisor	bradduty@vaumc.org
Virginia United Methodist Foundation	Tommy	Herndon	VP of Legacy Giving & Stewardship	tommyherndon@vaumc.org
Virginia United Methodist Foundation	Courtney	Howell	Operations Manager	courtneyhowell@vaumc.org
Virginia United Methodist Foundation	Randolph	Shelton	VP Lending and Capital Development	Randyshelton@vaumc.org
Wesleyan Investive	David	McCaskill	Sr. VP	dmccaskill@tmf-fdn.org
Wisconsin United Methodist Foundation	Krystal	Goodger	President	kgoodger@wumf.org
Wisconsin United Methodist Foundation	Jason	Mahnke	Director of Programming and Campaigns	jason@wumf.org

Sponsors

Platinum: The Humphrey-Kelly Group – Bank of America/Merrill Lynch	Junaid	Ahmad	Wealth Management Advisor	junaid_ahmad@ml.com
Platinum: The Humphrey-Kelly Group – Bank of America/Merrill Lynch	William (Billy)	Gupton	First Vice President, Senior Financial Advisor	william_gupton@ml.com
Platinum: Stellar Technology Solutions, LLC	John	Burke	Chief Business Development Officer	jburke@stellartechsol.com
Platinum: Wespath Institutional Investments	Joe	Halwax	Managing Director, Institutional Invesment Services	jhalwax@wespath.org
Platinum: Wespath Institutional Investments	Karen	Manczko	Director, Institutional Relationships	kmanczko@wespath.org
Platinum: Wespath Institutional Investments	Evan	Witkowski	Manager, Institutional Relationships	ewitkowski@wespath.org
Platinum: Wespath - Clergy Financial Well-Being Initiative	Dale	Jones	Managing Director, Church Relations	djones@wespath.org
Platinum: Wespath - Clergy Financial Well-Being Initiative	Candace	Lewis	President/Dean Gammon Theological Seminary	deanclewis@gammon-itc.org
Platinum: Wespath - Clergy Financial Well-Being Initiative	Bonnie	Marden	CFWI - Project Manager	clergyfinance@wespath.org
Platinum: Wespath - Clergy Financial Well-Being Initiative	Thad	Austin	Ormond Center at Duke Divinity School	thad.austin@gmail.com
Gold: Hardy Reed	Vince	Chamblee	Senior Financial Adviser	vchamblee@hardyreed.com
Gold: Hardy Reed	Ken	Mathis	Chief Operating Officer	kmathis@hardyreed.com
Gold: Hardy Reed	Scott	Reed	CEO	sreed@hardyreed.com
Gold: Horizons Stewardship	Joe	Park	Principle	jpark@horizons.net
Gold: United Methodist Insurance Program	Jeff	Koch	President, CEO UMI	jkoch@umins.org
Gold: United Methodist Insurance Program	Kevin	Gallagher	President, CEO	keving@sovinsurance.com
Silver: Dakota Wesleyan University	Alisha	Vincent	Associate Professor, Nonprofit Administration	alisha.vincent@dwu.edu
Silver: Foundant	Bryan	Geary	Community Foundation Solutions Engineer	bryan.geary@foundant.com
Silver: Foundant	Andy	Kessenich	Manager Client Success	andy.kessenich@foundant.com
Silver: UMC Foundation Investment Management	Ehren	Congdon	President	econgdon@investumc.org

2022

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ANNUAL MEETING

SAN ANTONIO