



NAUMF

National Association of
United Methodist Foundations



2026
ANNUAL MEETING

Hello Friends,

Welcome to Waves of Grace, our 2026 Annual Meeting! Whether you are an NAUMF colleague, an invited guest or one of our guest speakers, I am so glad you are here. It is a joy to gather with people who care so deeply about this work we are called to do.



This is my first Annual Meeting as your Executive Director, and I want to begin with gratitude. To everyone who has reached out with a kind word, answered my questions, shared your wisdom or simply made me feel at home as I stepped into this role: Thank you!

My hope for our time together is that it is rich in content and richer still in conversation. May the ideas shared in our sessions follow you home and spark new questions, partnerships and opportunities to keep engaging with one another throughout the coming year.

I also want to thank our sponsors. They are more than sponsors; they are partners, and each can play a tremendous role in helping us advance our work. Please stop by each table and visit with their representatives. Even if you don't see a way to work with a particular company right now, every one of them has a great deal to offer as subject matter experts, and we will continue to engage with all of them throughout the year.

Finally, a special word of thanks to Rev. Lynn Kilbourne. Lynn led this association with grace and a deep love for its people, and she has been unfailingly gracious to me throughout this transition. Last year she shared a simple prayer with us: "Lord, we give you thanks for work worth doing." I am grateful to carry that prayer forward, and grateful to Lynn for the strong foundation on which we continue to build.

Warmly,

A handwritten signature in dark blue ink that reads "Susan".

Susan Cothorn
Executive Director
National Association of United Methodist Foundations





We are a network of United Methodist Foundations across America organized to help each other accomplish our goals related to stewardship, planned giving and securing the future funding of our United Methodist churches, agencies and ministries.

MISSION

The National Association of United Methodist Foundations (NAUMF) is an organization of foundations related to the United Methodist Church whose purpose is to enhance the ministries of the church through:

- the development of endowment funds,
- the creation and administration of charitable trusts,
- the solicitation of charitable funds,
- management of long term funds for churches, agencies and institutions of the United Methodist Church and
- assisting persons in developing wills, trusts, planned giving instruments and estate plans that will:
 - maximize estate to family,
 - minimize taxes and
 - provide for the ministry of the church.

PURPOSE

The purpose of the National Association of United Methodist Foundations is:

- to create a new consciousness of Christian philanthropy,
- to enhance the giving heart,
- to strengthen the local church for ministry and
- to strengthen the general church for ministry.

NAUMF.org

Dear Friends and Colleagues,

On behalf of the Southeastern Jurisdiction, it is our great joy to welcome you to Palm Coast, Florida, for the 2026 Annual Meeting of the National Association of United Methodist Foundations.

We are especially glad to welcome you to our corner of the connection. Palm Coast offers a beautiful setting along Florida's Atlantic coast, but we know that what makes this gathering meaningful is not simply where we meet. It is the opportunity to step away from our daily responsibilities, reconnect with friends and colleagues, learn from one another, and remember the shared purpose at the heart of our work.

Our foundations serve in different places and in different ways, but we share a calling to help churches and ministries faithfully steward the resources God has entrusted to them. We help people turn generosity into lasting impact. We help ministry leaders imagine what might be possible. And, especially in seasons of change and uncertainty, we provide the steady partnership that allows ministry to move forward.

That work is strengthened whenever we gather as NAUMF. Some of the most valuable moments during these days will happen in presentations and workshops. Others will happen over a meal, in a hallway conversation or during an honest exchange with someone who understands both the opportunities and challenges of this work.

Our hope is that you leave Palm Coast with new ideas, renewed energy and a deeper appreciation for the people who share this ministry with you. We also hope you will find a little time to enjoy the beauty of Florida's coast and the warm hospitality of the Southeastern Jurisdiction.

Thank you for the leadership you provide, the relationships you nurture and the many ways you help generosity become ministry. We are grateful you are here and look forward to the time we will share together.

Welcome to Florida—and welcome to the 2026 NAUMF Annual Meeting!

With gratitude and anticipation,

Southeastern Jurisdiction Host Committee



"From his fullness we have all received, grace upon grace."

John 1:16

United Methodist Foundations of the Southeastern Jurisdiction

Alabama-West Florida United Methodist Foundation

Billy McCarthy, Executive Director

Methodist Foundation of North Alabama

Mike O'Kelley, Executive Director

Florida United Methodist Foundation

Ed New, President & CEO

Georgia United Methodist Foundation

Carol Johnston, Interim President & CEO

Holston Foundation

LeRae Edwards Collins, President & CEO

Kentucky United Methodist Foundation

David Bowles, President

Methodist Foundation of Mississippi

Todd Marion, Interim Director - Chief Financial Officer

United Methodist Foundation of North Carolina

Rich Bowlin, CEO

United Methodist Foundation of Western North Carolina

David Snipes, President & CEO

South Carolina United Methodist Foundation

Robert M. "Bob" Vincent, President

United Methodist Foundation for the Tennessee-Western Kentucky Conference

David O. Weatherly, President

Virginia United Methodist Foundation

Steven J. Summers, President

United Methodist Higher Education Foundation

Cara Stultz Costello, President & CEO





MONDAY, OCTOBER 26

10:00 am–5:00 pm
Attendee Registration

Ocean Pre-Function

10:00 am–1:00 pm
Executive Committee Meeting

Hammock Board Room

12:00–5:00 pm
Exhibits Open

Ocean Pre Function

1:30–3:00 pm
Opening Worship
Opening Session

Clipper/Surf
Jeremy Hearn
Bishop Tom Berlin

3:00–3:30 pm

Break

3:00–4:30 pm
Spouse/Guest Meet & Greet

Lodge Ocean View Terrace
(See page 14–15 for more information)

3:30–5:00 pm

Peer Group Conversations

Grants: Adama Brown, Director of Impact & Grants, UMF of the Northeast
Dev./Stewardship/Planned Giv.: Amy McGovern, Dir of Dev., MF for Arkansas, NW
Finance/CFOs: Ivanna Cole (CFO) and Nick Keller (Controller), UMF, Inc.
Communications/Marketing: Kelly Johannessen, Dir. of Comm., UMF of LA

Matanzas
Harbor
St. Augustine
Galleon

5:00 pm

Break

6:00 pm
Opening Dinner featuring Platinum Sponsor **Merrill/BOA**
with music by the String Poets Trio

Grand Event Lawn, Outdoors

Bishop Tom Berlin

Tom Berlin is a native of Winchester, Virginia. He graduated from Virginia Tech and Candler School of Theology at Emory University and was ordained an elder in 1990. He is the author of over a dozen books and studies used in congregations.

Bishop Berlin was a pastor in the Virginia Conference for 34 years before being elected as a Bishop of The United Methodist Church in 2022, by the Southeastern Jurisdiction. He was assigned to serve the Florida Episcopal Area beginning in 2023.

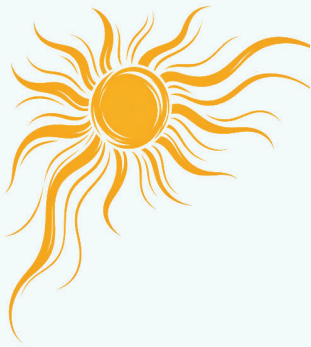
He travels extensively across the conference preaching in local churches and interacting with laity and clergy.

The bishop has chaired the Board of Governors at Wesley Theological Seminary, led delegations to General Conference and served on the Commission on a Way Forward and the team that created the Protocol of Grace and Reconciliation through Separation. He finds joy in the way of Jesus Christ, in the promise of resurrection, hope and in the Spirit who moves and works within us today.

Tom is married to Karen, and they have four adult daughters who have enabled him to grow in sanctification and see people and life in ways he would have missed without them. He enjoys spending time with family and friends, traveling, hiking and woodworking.



Bishop Tom Berlin



MERRILL 
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The Humphrey-Kelly Group

DINNER PLANS

OPENING CELEBRATION DINNER

MONDAY, OCTOBER 26, 6:00 PM

GRAND EVENT LAWN

featuring

Platinum Sponsor Merrill/BOA



TUESDAY, OCTOBER 27

7:30-8:30 am

Breakfast

Atlantic Ballroom

8:00 am-4:00 pm

Exhibits Open

Ocean Pre-Function

8:30-9:00 am

Morning Worship

Clipper/Surf

Jeremy Hearn and Bishop Tom Berlin

9:00 am-3:45pm

Spouse/Guest Activity

Exploring St. Augustine

(See page 14-15 for more information)

Learn & Connect Sessions*

9:15-10:00 am

A) Horizons Stewardship

B) Wespeth

C) Whiterock Technologies

*Becoming an Essential Partner: Helping Churches Thrive**Building a Sustainable Marketing Strategy**What High Performing Foundations Do Differently*

Joe Park & Erica Allen

Evan Witkowski

Joe Yelanich

10:15-11:00 am

A) Tinsley Creative

B) Merrill Lynch

C) Hardy Reed

*Choosing a Communications Partner**Q3 Chartbook: An Election Season Capital Markets Update**How to Create an RFP That Gets You What You Need*

Donovan Tinsley

Josh Nagel

Scott Reed & Mark Mensack

11:15 am-12:00 noon

A) FidTech

B) CapTrust

C) Freewill

*Turning Efficient Operations Into Better Church Service**Market Outlook - The US Earnings Engine**Why the Church is Falling Behind in Legacy Giving*

Charles Pia

Mike Valone

Timothy McClendon

12:00-1:00 pm

Jurisdictional Lunches

Center Courtyard, Outdoors

1:00-2:30 pm

Business Meeting

Clipper/Surf

2:30-4:00 pm

Keynote Speaker, Rev. Matt Miofsky

Clipper/Surf

Let Go: Leaning into the Future without Fear, Part 1

6:00 pm

Dinner featuring Platinum Sponsor Horizons Stewardship

with music by Bay Kings Band

South Ocean Tower Pool Deck, Outdoors

*Learn & Connect Meeting Locations:

A - St. Augustine

B - Harbor

C - Matanzas

Rev. Matt Miofsky

Matt Miofsky is the Lead and Founding Pastor of The Gathering in St. Louis, Missouri. Since Matt founded The Gathering in 2006, it has grown into a thriving multi-site congregation with soon-to-be five locations scattered throughout St. Louis.

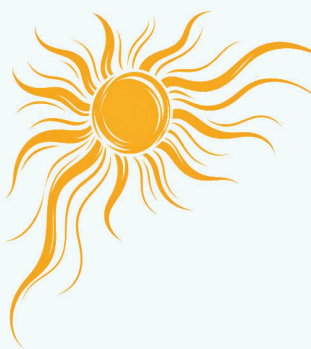
Matt is a passionate speaker about church planting, connecting with new generations and multi-site ministry.

He is also the author of "The Methodist Book of Daily Prayer" (Abingdon, 2023), "Let Go: Leaning Into the Future Without Fear" (Abingdon, May 2019), "8 Virtues of Rapidly Growing Churches" (Abingdon Books, October 2018), "Happy? What It Is and How to Find It" (Abingdon Books, April 2017) and "Fail: What to Do When Things Go Wrong" (Abingdon Books, September 2017).

Matt gained a degree in Advanced Math and played football at Washington University and then earned a Master's of Divinity from Candler School of Theology at Emory University. He served as an associate pastor for a local UM church in St. Louis before starting The Gathering. He now lives with his wife and three kids in St. Louis.



Rev. Matt Miofsky



DINNER PLANS

OUTDOOR POOL DECK DINNER

TUESDAY, OCTOBER 27, 6:00 PM

SOUTH OCEAN TOWER POOL DECK

featuring

Platinum Sponsor Horizons Stewardship



WEDNESDAY, OCTOBER 28

7:30- 8:30 am Breakfast	Harbor
8:00 am-3:00 pm Exhibits Open	Ocean Pre-Function
8:30-9:00 am Morning Worship Jim Argue Award Presentation	Clipper/Surf Jeremy Hearn Ed New, President, UMF of Florida Jason Gant, Warren Willis Camp & Conf. Ctr.
9:00 am-3:00 pm Spouse/Guest Activity	Pool Cabana Rentals, Fantasy Pool Complex (See page 14-15 for more information)
9:00-10:30 am Plenary Session Rev. Matt Miofsky	Clipper/Surf Let Go: Leaning into the Future without Fear Part 2
10:30-11:00 am Break	Ocean Pre-Function
11:00 am-12:00 pm Strategic Visioning Recap	Clipper/Surf Dr. Alisha Vincent, Vice-President Dakotas/Minnesota Methodist Foundations
12:00-1:00 pm Lunch featuring Platinum Sponsor Wespath	Center Courtyard, Outdoors
1:00- 3:00 pm NAUMF Leadership Team Panel Discussion • Governance: Jeff Taylor, President, UMF of West Virginia • Fees & Budgeting: Dustin Petz, President, Kansas Methodist Foundation • Communications/Marketing: Rev. Ed New, President, Florida UMF • Mission/Mentorship: Rev. David Bell, President, UMF of Michigan • What's Next?: Susan Cothorn, Executive Director, NAUMF	Clipper/Surf
3:00-4:00 pm	Break
4:00-5:00 pm Closing Reception	Grand Event Lawn, Outdoors

Dr. Alisha Vincent

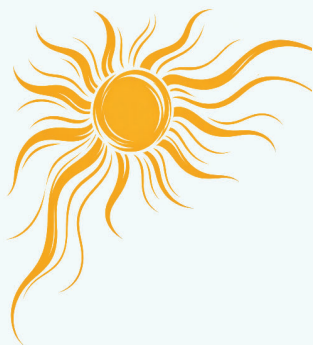
Dr. Alisha Vincent serves as vice president for the Dakotas and Minnesota Methodist Foundations, where she oversees investment support, programming, leadership development, planned giving strategy and partnership development. She brings more than a decade of experience in United Methodist higher education and ministry-focused leadership.

Since 2013, Dr. Vincent has served Dakota Wesleyan University in roles including professor, associate provost and director of the Practical Church Leadership program, helping clergy and lay leaders develop practical skills in ministry, administration, stewardship and organizational leadership. She has also partnered with United Methodist foundations to strengthen clergy leadership, financial stewardship and congregational vitality.

Dr. Vincent has maintained a consulting practice since 2004, advising nonprofits, churches and other organizations on strategy, governance and program development, and she has served on the Board of Ordained Ministry as a lay member. She is passionate about equipping churches and leaders to cultivate generosity, steward resources faithfully and develop innovative approaches to ministry.



Dr. Alisha Vincent



Wespath
INSTITUTIONAL INVESTMENTS

LUNCH PLANS

COURTYARD LUNCH

WEDNESDAY, OCTOBER 28, 12 NOON

CENTER COURTYARD

featuring

Platinum Sponsor Wespath



Jeremy Hearn – Worship Leader

A native of St. Petersburg, Florida, Jeremy Hearn found his call to worship ministry summer of 2002 on a youth mission trip with St. Pete First UMC, providing hurricane relief to people on the island of Eleuthera, Bahamas.

Through the mid 2000s, Jeremy worked in both the Country and Christian music industries in Nashville, Tennessee, before turning his focus back to the needs of the local church. Hearn has experience working with, and learning under, names like Martina and John McBride, Big and Rich, Bon Jovi, Michael W. Smith, Jeremy Camp, Matt Maher and Paul Baloche.

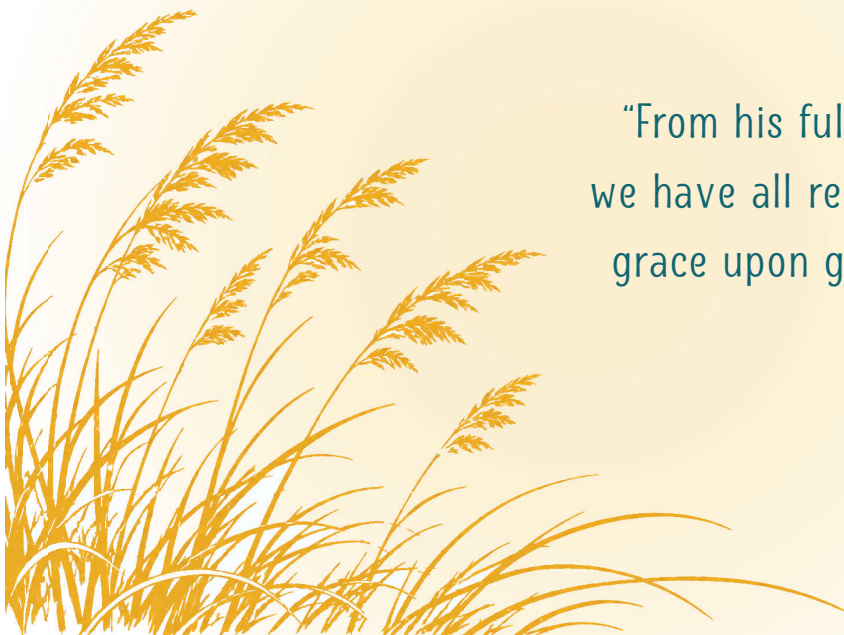
In 2009, Hearn helped launch Wells Branch Community Church, a church plant in Austin, Texas, where he served as a founding member and founding worship leader.

Currently, Jeremy Hearn resides in Lakeland, Florida, with his wife and two daughters and serves as the Director of Modern Worship Arts for First UMC Lakeland, Worship Coordinator for the Florida Annual Conference.

He is also the Founder and CEO of the Institute for Modern Worship – a worship staffing, equipping and retaining organization Hearn launched with the help of several UMC clergy and worship leader friends.



Jeremy Hearn



"From his fullness
we have all received,
grace upon grace."

John 1:16

Two Evenings of Music

String Poets Trio

Monday, October 26, 6:00 pm

Opening Celebration Dinner

Grand Event Lawn

Enjoy an evening of live music with the String Poets Trio, a talented ensemble providing a blend of sophisticated classical, jazz and contemporary music.



Bay Kings Band

Tuesday, October 27, 6:00 pm

Outdoor Pool Deck Dinner

South Ocean Tower Pool Deck

After two full days of learning and connecting, unwind on the pool deck with dinner and the sounds of the Bay Kings Band. This high energy band performs everything from classic favorites and Motown, to funk, soul and current hits.

Welcome Spouses and Guests!

We're delighted that you have joined us here in sunny Florida!

The spouse/guest registration for the 2026 NAUMF Annual Meeting includes breakfast on Tuesday and Wednesday, dinner on Monday and Tuesday and the closing reception on Wednesday. The dress code for all events is business casual or Florida resort. Please note that lunches are not included, so you should make separate lunch plans during the event.



MONDAY, OCTOBER 26TH

3:00–4:30 pm **Spouse Meet and Greet** **Lodge Ocean View Terrace**

Sponsored by the Florida United Methodist Foundation

Open Bar with beer, wine, tea and water, and small bites

6:00 pm **Opening Reception and Dinner** **Grand Event Lawn, Outdoors**

TUESDAY, OCTOBER 27TH

7:30–8:30 am **Breakfast** **Atlantic Ballroom**

9:00 am **Bus Departs for St. Augustine** **Meet in hotel lobby**

9:45 am **Arrive at St. Augustine Visitor Information Center**
(Bus will be parked here)

On your own to explore/shop/lunch

Suggestions: St. George Street, Aviles Street, Old Towne Trolley Tours, Fountain of Youth, Castillo De San Marcos, Flagler College, San Sebastian Winery, Ice Plant Bar, St. Augustine Distillery

3:00 pm **Bus Departs** **St. Augustine Visitor Info Center**

3:45 pm **Arrive at Resort/Hotel**

6:00 pm **Dinner** **South Tower Pool Deck, Outdoors**



St. Augustine is America's oldest city, with historic architecture, beautiful streets, unique shops and rich Spanish heritage.



Stroll along St. George Street in the heart of St. Augustine's historic district and enjoy the local shops, galleries and inviting cafés.

WEDNESDAY, OCTOBER 28TH

7:30–8:30 am Breakfast

Harbor Room

9:00 am–3:00 pm Pool Cabana Rentals

Fantasy Pool Complex

Provided by the Florida United Methodist Foundation, Cabanas 8, 9, and 10

9:00 am–3:00 pm Other Options at the Resort

- Full-Service Spa & Salon
- Tennis & Pickleball
- Nine-hole Putting Course
- Bicycling
- Beach Access
- Daily Group Fitness Classes

Other Options in the Area. Transportation Not Provided:

- Washington Oaks Gardens State Park (3 miles away from Resort)
- St. Augustine Alligator Farm Zoological Park (21 miles away from Resort)
- St. Augustine Lighthouse & Maritime Museum (23 miles away from Resort)

4:00 – 5:00 pm Closing Reception

Grand Event Lawn, Outdoors

Your host/contact person for the Spouse/Guest Activities:
Annie Steelman Phone: 816-582-3595 asteelman@fumf.org

NAUMF 2026 Annual Meeting Sponsors

Platinum Level



Gold Level



Silver Level



2026 WINNER

THE WARREN WILLIS CAMP & CONFERENCE CENTER



James B. "Jim" Argue was a dedicated United Methodist layperson and public servant who worked to make the world a better place. Before his passing in 2018, he served 37 years as president of the Methodist Foundation of Arkansas and 18 years in the Arkansas Legislature. In his memory, the National Association of United Methodist Foundations honors his legacy through an annual group donation to a worthy nonprofit.

This year's recipient, **The Warren Willis Camp & Conference Center**, has been a place of Christian community, spiritual formation and transformation for generations of children, youth, families and church leaders. Through summer camps, retreats and other gatherings, Warren Willis creates opportunities for people to step away from their everyday routines, experience God in a unique setting, build meaningful relationships and grow in their faith. For many young people especially, their time at camp

becomes a formative experience—one where they discover a deeper sense of belonging, hear a call to ministry or service, or simply come to understand that they are known and loved by God.

The camp spans more than 300 acres along beautiful Lake Griffin near Lakeland, Florida. Guests enjoy waterfront activities, team-building opportunities, conference spaces, a chapel for worship and reflection and a prayer labyrinth for meditation and spiritual renewal.

Support through the Jim Argue Award helps strengthen this important ministry and ensures that these experiences can continue to shape lives for years to come.



James B. "Jim" Argue

Meet Our Nonprofit Partners



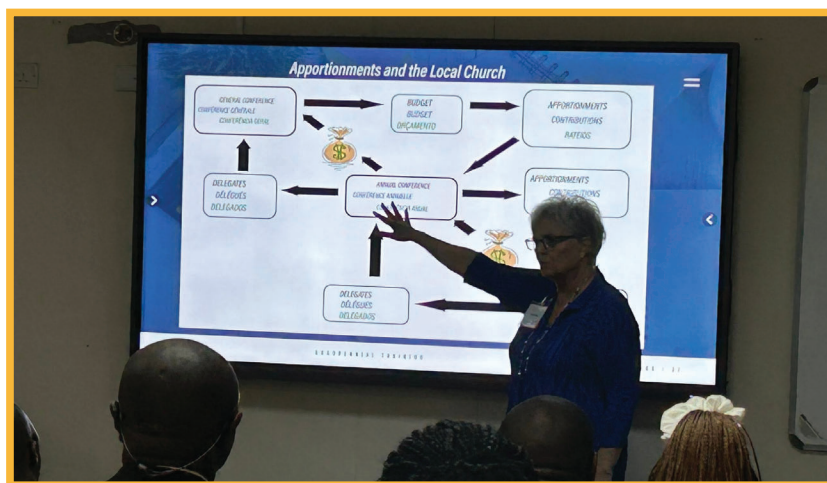
New this year, NAUMF is pleased to welcome three nonprofit partners whose work strengthens the churches and ministries our Foundations serve.

The General Council on Finance and Administration (GCFA) supports the financial and administrative ministries of The United Methodist Church, including technology services for local churches, conferences, camps and other connectional ministries through UMC Support.

The Caring Congregation helps churches of every size build cultures of care, drawing on a proven model of congregational care ministry and a library of training resources.

The NC Rural Center's Connect Church program coaches congregations for a year as they map their assets, understand their communities and build a plan for mission beyond the church walls.

Please stop by their tables and visit with them throughout the meeting to learn how their resources might help your congregation or ministry.



The General Council on Finance and Administration (GCFA) serves The United Methodist Church by coordinating and administering financial resources and policies, reviewing agency budgets and audits and submitting the denomination's quadrennial budget to General Conference.

GCFA also safeguards the legal interests of the Church, maintains a group tax exemption for United Methodist entities, gathers denominational data and provides administrative support. Through UMC Support, GCFA offers affordable services such as communications and marketing, human resources, information technology, copyright consulting and travel and meeting planning, helping ministries reduce administrative costs and keep more resources focused on mission and ministry.



The Caring Congregation (TCC) equips church leaders to build vibrant, team-based care ministries that support people through life's celebrations and challenges.

Founded by Rev. Karen Lampe, TCC provides training and resources to develop spiritually grounded, emotionally healthy care teams. Its adaptable approach has equipped thousands of leaders nationwide and is recognized by United Methodist Discipleship Ministries as a qualifying course for Certified Lay Ministers specializing in congregational care. Inspired by Jesus' model of compassionate care, TCC helps churches strengthen their congregations and extend Christ-centered care into their communities.



Since 2018, the NC Rural Center's Faith in Rural Communities team has guided more than 100 churches in 60+ North Carolina counties through **Connect Church**, a yearlong coaching program that helps rural congregations identify their strengths and create meaningful community impact.

Based on asset-based community development research, the program helps churches inventory their unique resources, including facilities, land, skills and expertise. Teams then listen to community members to understand local needs and develop projects that use the church's existing assets to address those needs. Now, the Rural Center and its partners are expanding Connect Church to rural communities across the nation.

Nonprofit Board Member Responsibility Overview

Board members influence both the internal and external workings of a nonprofit to advance the organization's mission. The following overview is designed to support the experience of a new board member.

Fiduciary Duties of Nonprofit Board Members		
Care	Loyalty	Obedience
To make decisions on behalf of the organization using prudence and due diligence	To put the needs of the organization before individual's personal and professional interests	To ensure that the organization obeys applicable laws and regulations, follows governance documents, and adheres to its stated mission and purpose

Overall Board Responsibilities

- Determine and uphold the mission, vision, and values of the organization
- Drive strategic and organizational planning
- Select, assess, and support the Chief Executive Officer (CEO)
- Uphold legal and ethical integrity
- Adopt policies to address conflicts of interest
- Ensure strong financial oversight including: budget, audits, and forecasts
- Maintain a strong risk management culture throughout all levels of the organization
- Support the fundraising process
- Assess board performance regularly

Individual Board Member Responsibilities

- Understand and uphold the organization's mission, policies, programs, and goals
- Be familiar with the financial structure of the organization
- Understand and uphold fiduciary duty and governance practices
- Participate in one or more Board committees
- Uphold confidentiality pertaining to organizational matters
- Advocate and serve as ambassador for the organization - leveraging personal connections to achieve nonprofit's mission
- Contribute financially in a personally meaningful way and be comfortable assisting with raising resources
- Consistently attend, prepare for, and participate in board meetings

Qualities of a Successful Board Member

- Have a strong passion for the mission of the organization
- Be inquisitive, open minded, and committed to learning
- Be able to consider and discuss diverse opinions
- Be open to sharing personal network connecting others to the organization's mission

Source: Boardsource - <https://boardsource.org/>: Board Members Job Description; Fundamentals Topics of Nonprofit Board Service Role Responsibilities

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De-Risk Your Church's Next Capital Campaign

A capital campaign is a step of faith AND a moment of significant risk. Churches can fall short of their goals. Leadership teams can fracture under pressure. Questions left unaddressed can become resistance. And most importantly, a poorly designed process can damage something far more valuable than money: trust.



For foundations and ministry partners, this creates an important opportunity. Churches do not simply need access to capital. They need trusted guides who can help them discern wisely, plan carefully, and move forward faithfully.

The strongest capital funding initiatives transcend financial transactions and become spiritual journeys. This journey is filled with moments when vision, leadership, discipleship, generosity and organizational health catalyze to create a meaningful next season of ministry.

Here are five practices that can dramatically reduce risk.

1. Move Beyond Assumed Alignment. People often enthusiastically approve a project they are not prepared to financially support. Healthy leaders create opportunities for honest feedback before decisions become irreversible. That means listening closely to governing leaders, ministry leaders and the households whose generosity provides much of the church's financial foundation. The goal is not simply agreement. The goal is ownership.

2. Make the Vision Impossible to Miss. Before asking, "How much can we raise?" churches should answer: Where are we today? What is holding us back? Why can't we remain here? Where is God leading us? Why now? How will we get there? A compelling vision helps people see the ministry that becomes possible when the obstacle is removed. People sacrifice for a future they believe God is calling them to create.

3. Engage Leaders Before You Test the Vision. A process that values trust and seeks to help that grow in a church creates space first for conversation, prayer, questions and refinement. Engaging ministry and financial leaders early does three things: it strengthens alignment, builds financial support and transfers ownership. It also communicates something essential: We are not asking leaders simply to fund the vision. We are asking them to help shape it and then help carry it.

4. Don't Guess. Test. Hope is not a funding strategy. Churches need reliable information about readiness, leadership support, financial capacity and potential obstacles. A strong feasibility-readiness process provides confidential feedback, objective analysis, benchmarks and clear recommendations.

Testing does not diminish faith, it prepares a church to move into a campaign with wisdom.

5. Build the Roadmap Before Launching the Campaign. The biblical pattern of 1 Chronicles 29 is powerful: leaders go first, and then the people are invited to participate. Financial leaders need clear goals, intentional communication, invitations to commitment, measurable milestones and a thoughtfully designed timeline.

When a deeply prayerful preparation season is followed by a season that invites leaders and then compels others in the church to meaningful generosity, the journey creates confidence, momentum and shared responsibility.

The Opportunity for United Methodist Foundations

The most valuable question may not be: "How can we help this church finance the project?" It may be: "How can we help this church become ready for everything God is calling it to do?"

That is where foundations can become more than financial resources. Connecting churches to trusted ministry partners like Horizons Stewardship helps churches develop clarity, confidence and deeply formed disciples which fuels ministry long after the campaign is over.

Generosity grows
where vision is
clear.



Strategic Ministry Planning

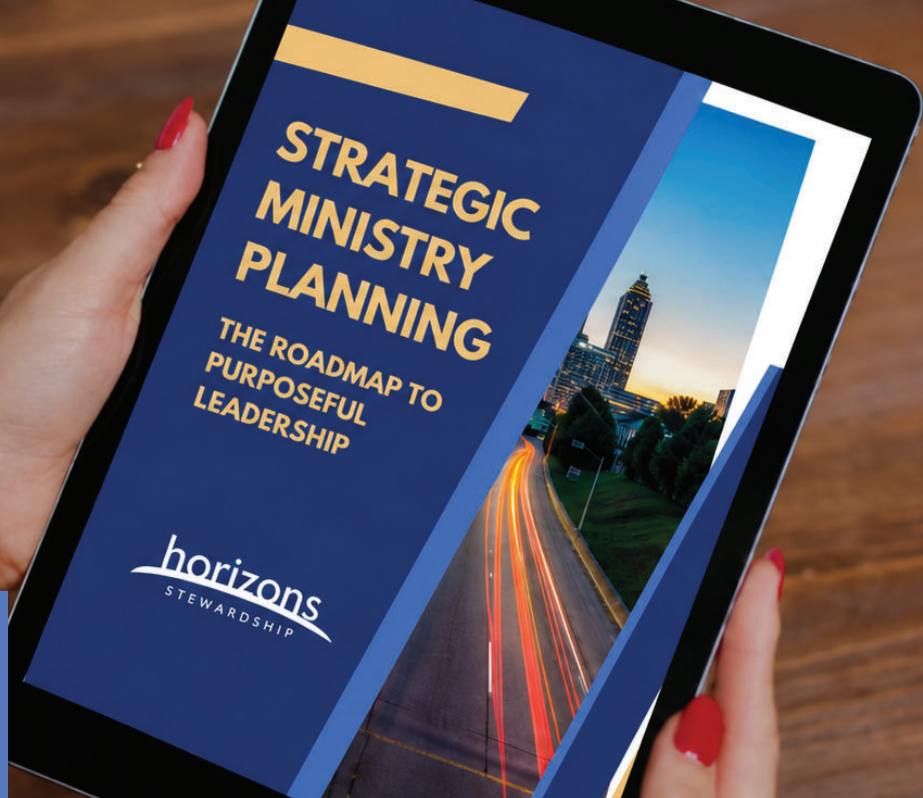
Your foundation already has
their trust.

Together, we can help them
take the next step.

Grow Disciples.
Fund Ministry.



Horizons.net



The Roadmap to Purposeful Planning

Churches come to foundations with dreams:
A new ministry. A changing community. A
building that needs attention. A vision for the
next generation. A need to grow generosity.

Before the question is “How do we fund it?”
there is often a more important question:
“Where is God calling us — and how do we
get there?”

Horizons Stewardship helps churches
connect: VISION, STRATEGY, DISCIPLESHIP,
GENEROSITY, and IMPACT

Through strategic ministry planning,
generosity development, capital campaigns,
annual campaigns, analytics, and coaching, we
help churches turn God-inspired vision into
ministry that can be implemented and funded.

What's Something Worth When You Can't Measure It? Appreciating the Value of Connectionalism and Discipleship

By: Karen Manczko (Wespath, Director, Institutional Relationships)

When we talk about the value of something, we often default to a monetary measure. For example, what is the value of the *I Love Lucy* doll my Great Aunt Jenny gave me when I was a little girl? A quick Google search tells me it's worth about \$149.99.

But what about the value of something intangible—the sentiment behind that doll, the memories of going to visit my Great Aunt Jenny and playing with this doll? How do you know something's worth when it can't be captured in dollars and cents?

The same question applies to faith-based organizations and the principle of connectionalism. Connectionalism is the idea that we are stronger together—that churches, foundations, conferences and other ministries are interconnected in mission, resources and support. It evokes a network of shared responsibility and mutual care that amplifies the reach of every act of service.

Through connectionalism, a local church is not limited by the bounds of their community or congregation. It can impact incredible work, like disaster relief, education and social initiatives, by connecting with a borderless network of people and organizations seeking to accomplish a shared mission.

This concept is not something you can easily measure. Its outcomes are transformative, but its value is difficult to quantify. As such, we might observe that the true value of connectionalism has become overlooked and underappreciated.

Another essential aspect of our shared life that is just as intangible and often overlooked is the concept of discipleship. Discipleship is the ongoing formation of individuals and communities in the way of Christ. It is slow, intentional work. And yet, its value is immeasurable. Discipleship shapes hearts, cultivates purpose and equips people to make faithful, courageous decisions in service to others. In the same way connectionalism multiplies our impact, discipleship multiplies the depth of that impact by forming people who live out the mission with integrity, compassion and spiritual maturity.

When we overlook discipleship because it cannot be quantified, we risk undervaluing one of the most essential investments a ministry can make: the formation of its people.

And here's the beauty—connectionalism and discipleship are deeply intertwined. Connectionalism creates the shared ecosystem where discipleship can take root: networks, encouragement, accountability, spiritual nourishment and collective mission. Discipleship, in turn, gives connectionalism its meaning by forming people who embody the mission and carry it into the world.

At Wespath, we see the importance of these principles every day. We are always measuring those things which do have clearly defined values—stocks and bonds and portfolios and investment accounts. But beyond the numbers, we understand that these resources ultimately serve something bigger: enabling ministries to nurture disciples, develop leaders, expand outreach and sustain the mission for generations to come.

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Wespath provides organizations with comprehensive nonprofit investment solutions designed to advance their financial goals and support their missions. As a faith-based, nonprofit firm, our approach combines investment excellence, comprehensive client service and sustainable impact.

What Sets Us Apart

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As a nonprofit exclusively serving other nonprofits, we share your passion for purpose. With Wespath's century of experience and over \$27 billion in assets under management behind us, we deliver the capacity, reliability and values-aligned approach you need.¹



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When you work with Wespath, you're more than a number. You're connected with real people who care about your organization's success. We're here when you need us with timely reporting, operational support and strategic guidance.



3 Investing That Reflects Your Values

Your investments should tell your story. We integrate ethical exclusions, sustainability principles and impact investments into our investment process, consistent with our fiduciary duties.



4 More Than Just Investments

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¹As of December 31, 2025.

For nonprofit organizations, marketing has never simply been about promotion. It is about connecting people, inspiring them to participate in something meaningful.



What has changed dramatically is how those connections happen and how effectively we can measure them.

The continued growth of digital marketing has transformed the way nonprofits communicate with the partners they serve. Websites, email, social media, search, video and emerging AI-driven platforms provide more opportunities than ever to tell an organization's story and reach people where they are.

But more communication doesn't automatically mean better communication.

Meeting People Where They Are

Traditional communication remains important, particularly for organizations serving audiences across multiple generations.

At the same time, audiences increasingly expect organizations to communicate with them digitally.

Someone may first hear about an organization through their church, a colleague or an event, then visit its website, watch a video, follow on social media, subscribe to an email or newsletter and eventually become a donor, participant or advocate.

That journey rarely happens through a single communication channel.

For organizations such as those represented by NAUMF, this makes an integrated approach especially important. Every touchpoint should reinforce the same mission, message and sense of purpose.

Measuring Your Activity

One of the greatest opportunities digital marketing provides nonprofits is the ability to better understand what is connecting with people.

For years, communications reporting often focused on what was produced: newsletters sent, social posts published, events held or website traffic generated.

Those numbers only tell part of the story. But stronger analytics allow us to ask better questions.

Are people engaging with your mission? Which stories generate the greatest response? What topics are members interested in? Where are new donors coming from? Are your communications strengthening existing relationships while helping us build new ones?

The goal isn't to measure everything simply because we can. It is to identify the information that helps us make better decisions.

From Reporting to Understanding

Good reporting should do more than summarize what happened last month or last quarter. It should help nonprofit leaders understand why it happened and what to do next.

If a particular story generates significantly more engagement, what can we learn from it? If email participation is declining, should we reconsider frequency, content or audience segmentation? If people are visiting a giving page but not completing a donation, what is creating friction?

Analytics turn communications from a series of activities into an ongoing learning process.

And for nonprofits operating with limited staff, budgets and resources, that intelligence becomes even more valuable. Better information allows organizations to focus their time and investment on the things that are making the greatest difference.

Using Better Marketing to Advance the Mission

Technology will continue to change. Digital platforms will evolve. Artificial intelligence will create new opportunities. The ways people consume information will continue to shift.

The organizations that communicate most effectively won't necessarily be those doing the most marketing. They will be those that understand their audiences, communicate consistently across channels, measure what matters and use what they learn to continually improve.

Proper use of the analytics available make us better marketers.

It's the tool to help more people understand, support and become part of the mission.

Say goodbye to capacity issues.

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What Are High-Performing Foundations Doing Differently?

WhiteRock | Three observations from the field and what they might mean for your foundation.

Methodist Foundations vary widely in size, staffing and priorities. Yet in our work with foundations and other industries, we've noticed that organizations making meaningful progress aren't necessarily those with the most people, biggest budgets or newest technology.

Often, they're simply asking better questions about how they work.

1. They measure what matters, not just what's easy to count.

Assets under management and dollars raised tell part of the story, but what else tells you whether your foundation is becoming more effective?

Consider donor engagement, retention, staff time spent on administrative work, planned giving activity, reporting turnaround or how quickly leadership can access information needed for decision making.

The measures may differ, but the value of making the right information visible does not. For a private equity customer, WhiteRock created an executive reporting dashboard giving portfolio companies consistent visibility into the metrics their investors need weekly, monthly and quarterly. Built once and leveraged across multiple companies, the dashboards provide accurate information for better decisions.

How do you know your foundation is becoming more effective?

2. They build systems around the work, not work around the systems.

Progress often shows up in everyday work: reports that no longer require pulling information from multiple places, fewer spreadsheets maintained outside the system and donor history that stays accessible through staff transitions.

At the Methodist Foundation for Arkansas, iPhi and Salesforce integrations will soon automate more aspects of donor, grant and contact management. Staffers anticipate realizing day-to-day efficiency gains that increase the impact of their work.

Technology should make good processes easier, not force your people to adapt to unnecessary complexity. Where is your team still working around a system that should be working for them?

3. They don't assume their best ideas have to come from another foundation.

Methodist Foundations are unique, but the people they serve also interact with banks, healthcare providers, businesses, churches and universities. Their expectations travel with them.

Other industries offer useful ideas. What can healthcare teach us about continuity across long-term relationships? What can financial services teach us about making complex information understandable? What can service organizations teach us about improving user experience?

Outside the foundation community, WhiteRock client SEAM Group achieved a 20% year-over-year improvement in productivity by making its sales processes more efficient. A foundation may define productivity differently, but the opportunity to learn from how other organizations improve is the same.

High-performing foundations don't necessarily have more technology, staff or fewer challenges. What stands out is their willingness to keep learning: measuring what matters, questioning what creates unnecessary work and looking beyond familiar approaches for better ideas.

If you could start from scratch, what would your foundation measure, simplify or approach differently?

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What are high-performing foundations doing differently?

They measure what matters.

They build systems around the work.

They look outside their own walls for ideas.

We've been paying attention.

Join WhiteRock for
Observations from the Field
at the NAUMF Annual Meeting.

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Technology Isn't Back-Office Anymore. It's How You Serve Every Church.

Church treasurers and finance committees expect the same clarity and speed they get from their own bank. Foundation teams are being asked to support more churches, more investment pools, and more loans with the same headcount they had five years ago. That gap is where the leading foundations are separating from the rest.

What Churches Expect

Real-time investment pool balances, simple contribution and withdrawal requests, and clear loan investment balances, the same clarity they'd expect from their own bank.

What Teams Are Running On

Disconnected systems, manual reconciliation across custodians, and workaround-heavy processes never built to support this many churches at once.

Same Team. More Churches.

Foundations are being asked to support more fund holders and churches, more investment pools, and more loans without more headcount. The organizations winning this challenge aren't adding staff; they're fixing the operational processes underneath the work. Teams still running on disconnected systems and manual reconciliation aren't just working harder than they need to, they're carrying a strategic liability. Operational efficiency has stopped being a back-office concern and become a ministry-critical one.

Built for This Exact Challenge THE FOUNDATIONHUB ADVANTAGE

Automated Reconciliation Investment pool activity reconciled across custodians and your general ledger, daily and automatically.	Streamlined Withdrawals & Contributions Church staff can submit and track requests online, with configurable approval workflows.	Audit-Ready Reporting Real-time data in one place for every church, every pool, every loan, no more pulling numbers from multiple systems.
Open Architecture Integrates directly with your custodians, investment managers, banks, and loan servicing systems.	Church Self-Service Give church finance staff real-time visibility into balances, statements, and pool performance, on their own time.	Full Fund & Investment Lifecycle Investment pools, capital campaigns, and church loan pools all seamlessly operated.

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FidTech serves as the technology-enabled back office for the churches your foundation supports — handling investment pool administration, loan servicing, and fund accounting so your team can stay focused on mission and ministry, not manual reconciliation.

From Operational Strain to Strategic Advantage

HOW CHURCHES STRUGGLE TODAY

- ✗ Delays waiting on custodian and brokerage statements
- ✗ Churches frustrated by outdated balances
- ✗ Manual reconciliation draining staff time
- ✗ Limited scalability as you support more churches

HOW FIDTECH HELPS

- ✓ Real-time data aggregated across every custodian
- ✓ Live balances and activity, any time, any device
- ✓ Automated reconciliation, positions, and pricing
- ✓ Infrastructure built to scale with every new church

Built for Every Church You Serve



Faster Access to Information

Balances, transactions, and reports available when the church needs their information



Greater Transparency

Clear visibility into their investments, funds, loans and activity



Consistent, Accurate Reporting

Reliable statements and reports that church staff and leadership can trust



More Time for Ministry

With easy to access information and transactions, staff can spend more time serving constituents



Built for Growth

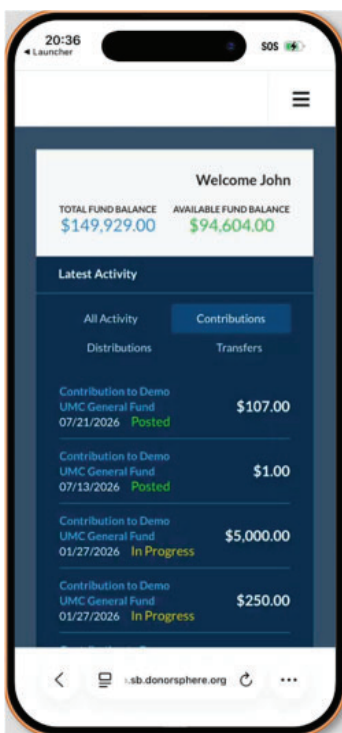
Give your churches the confidence they can expand their offerings and who they serve with a scalable platform



Greater Independence / Church Experience

Churches can initiate transactions, get updated statuses, etc. on their own schedule

Mobile Responsive on any device



“The team at FidTech has been an incredible partner to us. Their platform has streamlined our processes and brought a new level of clarity to how we serve our community. Their customer support is phenomenal, and they truly understand the unique needs of Methodist foundations. Working with them has been one of the best strategic decisions we’ve made.”

— David Bell, President and Exec. Director of the United Methodist Foundation of Michigan

Who's Who and What Do They Do?

By Scott Reed and Frank Riley



HARDYREED

When dealing with Foundation investments, there are a few ways to build your investment process. One way is to “wing it,” and I see that happen more times than you might imagine. Another way is to add someone to the payroll who has the expertise to run an investment process for the Board, but usually has little experience in fiduciary management. Or, you can outsource it, which is what most of the United Methodist Foundations seem to be doing.

If you outsource your portfolio management, you need to know what role your outsourced professional is going to play. There are three main roles that I see leading the investment process. The challenge is that all three want you to believe that they can do everything, but the differences can be drastic if you understand the potential consequences.

There are money managers. Money managers manage a portfolio. They may have a portfolio that they created for foundations which could be perfect for you. They may have a series of different investments they can offer a foundation. But remember, money managers are only responsible as a fiduciary for buying the right kinds of investments. So, if you hire someone to manage a large cap value position, they are required to buy large cap value stocks. They have no responsibility to help you decide if you need more large cap value stocks, or if that allocation complies with your IPS and your goals. That is all left to you.

There are consultants. Consultants are there to give you their ideas on what they think will work. They are not responsible for putting any of those ideas in your portfolio. That's up to the investment committee. You can tell if you are working with a consultant if the investment committee is required to vote on the recommendations. If you vote, then you are taking on virtually all of the fiduciary responsibility for that decision.

Further challenges and complexities arise when a consultant is also a money manager. In this scenario the consultant, who takes on virtually no fiduciary responsibility, can recommend their own investments that may very well cost more and perform worse than other investments in the category. It is very hard to be objective if you are a consultant that has access to your own “in house” products.

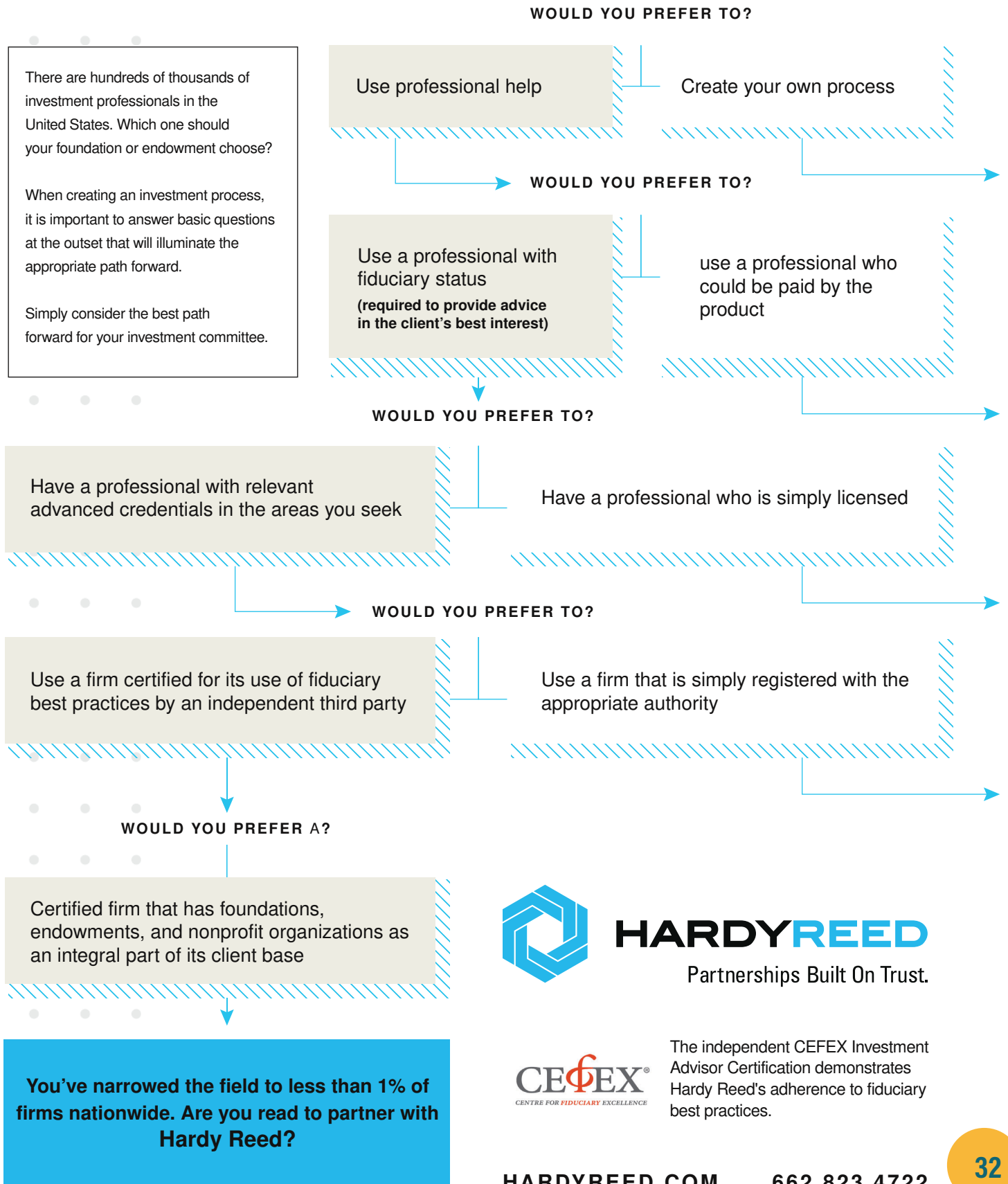
Finally, there is the adviser. Advisers in the foundation world take on virtually all of your fiduciary liability, from managing the IPS and the Equilibrium Spending Rate, to manager search and selection and due diligence of investments used. They have day-to-day discretion over the portfolios and are required to stay within the mutually agreed upon parameters of the IPS. And, they must act in the best interest of the foundation at all times, even if it is not in the adviser's best interest. You are still the boss and are required to have robust oversight, but have hired an expert to build a best in class investment process and alleviate most of your liability.

I think an adviser group is exactly what investment committees would want, and many think they have, but when you understand how the F&E industry has grown, you understand that for decades it was all about who can find the next hot manager. That is until Eugene Fama won the Nobel Prize in 2013 for letting us know that it was very unlikely that you would ever find that pot of gold. And yet, many foundations continue to outsource to organizations that promise the “next big trend.”

You have heard that “Culture eats strategy for lunch.” In our world, “Process eats product for lunch.” It's on the menu; all you have to do is give it a try.



Decision Tree for Foundations and Endowments



Why Predictions Matter Less Than Portfolio Construction

In an environment shaped by rapid technological change, shifting market leadership and policy uncertainty, investors face a widening range of possible outcomes. Here, the CAPTRUST Investment Group explains why predicting market moves is less effective than building diversified, resilient portfolios designed to weather many possible futures.

Every sharp market move tempts even the most disciplined investor with the same thought: if I can just get the forecast right, I can protect my portfolio, or better yet—profit.

The Problem with Prediction

Markets don't move in straight lines. Looking backward, it's easy to connect the dots and convince yourself that recent outcomes were inevitable. But the last three years of strong market returns represent just one path among many that could have occurred. The next five, 10 or 20 years may offer even more possible paths, especially as technological change accelerates and the complexities facing global economies rise.

This creates what investors often mistake as risk, but it more closely reflects uncertainty. In both cases, outcomes are unknown. However, risk allows for the probability of potential outcomes to be estimated, whereas uncertainty does not. When uncertainty rises, forecasts become less reliable, and confidence in a single market narrative can be costly.

Diversification as Scenario Preparation

True diversification isn't about owning more investments; it's about owning exposure to different economic drivers. Over the past decade, portfolio returns have increasingly been driven by a narrow set of forces, particularly the largest U.S. technology companies. That concentration delivered strong results, but it also left portfolios more vulnerable as leadership began to shift.

A late-2025 market rotation highlighted why diversification matters. As parts of the technology sector came under pressure from rising capital expenditures and stretched valuations, capital moved into more cyclical sectors such as energy, infrastructure and industrials, where valuations were more attractive. These shifts weren't triggered by a single forecast coming true, but by markets constantly reassessing a broad set of possibilities.

Accepting TradeOffs

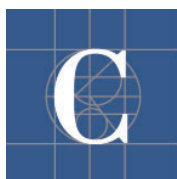
Preparing for multiple futures isn't about maximizing returns in a single scenario. A portfolio designed to handle uncertainty may not be optimized for any one outcome—but that balance is intentional.

The goal isn't to win one specific bet. It's to increase the probability of longterm success while reducing the risk of permanent loss.

Structure Outlasts Certainty

Forecasts and predictions will always be part of investing. They help frame conversations and test assumptions. But as uncertainty grows, their usefulness declines. What endures is portfolio construction: how assets work together, how risks are balanced and how flexibility is preserved.

In a world where the future may arrive faster—and look different—than expected, getting the structure right may matter more than being right about the prediction.



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Over the next two decades, an estimated \$124 trillion will pass from one generation to the next. It is the largest transfer of wealth in history, and roughly \$18 trillion of it is expected to go to charity.

Nonprofits have noticed. Universities, hospitals and national charities are building for this moment right now. They are hiring planned giving officers, launching legacy societies and putting simple will-writing tools in front of their donors. They ask on purpose and on a schedule.

The church, for the most part, is a passive participant. It waits, and it is grateful when a bequest happens to arrive.

Yet many of the people holding this wealth are sitting in our pews. They have tithed for fifty years, taught Sunday school, chaired the trustees and stayed late to stack the chairs. Most of them will leave nothing to their church. They love their church. Nobody asked.

The Great Wealth Transfer is not skipping the church. The church is skipping it.

The reasons are understandable. Pastors were never trained to talk about estates, and no finance committee wants a new appeal competing with the annual budget. Most local churches cannot build what a university builds. So the conversation never happens, and the estate goes to the organizations that did ask.

You already know this. Your foundation has been making this case for years, often with a small staff and hundreds of churches to reach. Most churches cannot build that structure on their own, but a foundation can build it once for every church it serves.

FreeWill helps you reach every pew. We give your foundation the tools and ready-made content. You pass them along to your churches. Each church offers its members a gift: a free will or trust, completed online in about 20 minutes. It is a soft ask: the church is serving its people. Along the way, each member is invited to leave a gift to their own church. When they choose to share that decision, it comes back to your foundation, and you steward that relationship for a lifetime.

I would love to hear what you are experiencing. What are you seeing in your churches? What has worked, and what has not? Find me at the FreeWill table, and let's compare notes.

The other nonprofits in your members' lives are already asking. Let's make sure the church does too.

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An estimated **\$124 trillion** is set to change hands in the next **30** years as Baby Boomers pass on their wealth to new generations. With older membership bases, foundations must prepare for the Great Wealth Transfer by prioritizing their strategies for legacy giving.

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- ✓ **Engage every Methodist**
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- ✓ **Give your churches the tools to succeed**
Gain a clear curriculum to guide end-of-life discussions with parishioners in pastoral settings
- ✓ **Access real-time, actionable data**
Track actionable giving trends, real-time data, and results, available at the foundation and church level

“

FreeWill has been a wonderful accompaniment to our parishes' legacy program because the purpose of our programs, first and foremost, is to ensure that every practicing Catholic has an updated will. By partnering with FreeWill, it allows us to say, 'if you don't have a will, then here is the way you can create your will in 20 minutes or less at no cost.' Then, we can follow up with the ask for them to consider making a provision in their will. We appreciate being able to provide our parishioners an opportunity to create a will.

For us, being able to measure the success of our legacy program has been huge. We love the marketing materials FreeWill creates for us, so we don't have to reinvent the wheel each time. And, of course, the continuous support and coaching from our strategist...has created accountability and allowed us to prioritize legacy giving.

Maggie F. Keenan, Ed.D.

Director of Planned Giving, Catholic Community Foundation of the Diocese of Richmond

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— Rev. Chet Jechura, Good Shepherd United Methodist Church, Maryland



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Chris Spencer, Vice-President
President & CEO | United Methodist Foundation of Louisiana



Ivanna Cole, Secretary
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Jeff Taylor, Treasurer
President, United Methodist Foundation of West Virginia, Inc.



JURISDICTIONAL REPRESENTATIVES

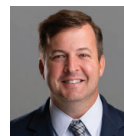
Manet Shettle, North Central,
President, Heartland Methodist Foundation



Ted Crass, Northeastern
President, United Methodist Foundation of the Northeast



Ed New, Southeastern
President & CEO, Florida United Methodist Foundation



Billy Meade, South Central
President, Oklahoma Methodist Foundation



Anne Green, Western
Executive Director, Desert Southwest United Methodist Foundation



AT LARGE MEMBERS

Lisa Greenwood
President & CEO, Texas Methodist Foundation and Wesleyan Impact Partners



Dustin Petz
President & CEO, Kansas Methodist Foundation



ADDITIONAL TEAM MEMBERS

David Bell, Past President
President & Executive Director, United Methodist Foundation of Michigan



Susan Cothorn, Executive Director
Director of Development Ministry, United Methodist Foundation of Louisiana



↑
To
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& Marina
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Condominiums
•
Conservatory
at Hammock Beach
•
A1A & I-95
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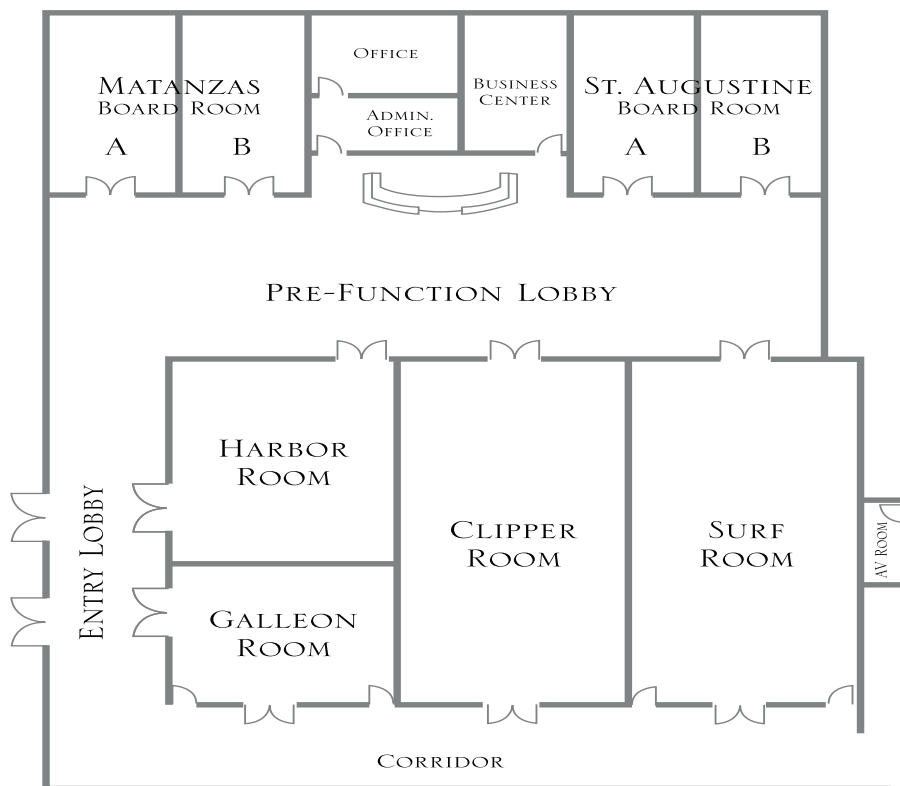
RESORT MAP

- **Dining**
 - Atlantic Grille 4610
 - Delfinos Italian Chophouse 5650
 - Beach Brew
 - Lobby Bar 5598
 - Loggerheads Sports Pub 5655
 - Ocean Bar Café 6587
 - Pizza & Gelato 5858
 - Stix Authentic Sushi 5226
- **Amenities**
 - Breeze's Boutique & Surf Shop 5514
 - Concierge 5555
 - Conservatory Golf Pro Shop 6710
 - Fitness Center 5589
 - Kids Crew 5661
 - Ice Machine (located on P1)
 - Ocean Golf Pro Shop 4711
 - Recreation 5351
 - Tennis Courts 5020
 - The Spa & Salon 5580
- 🦴 **Dog Waste Station**

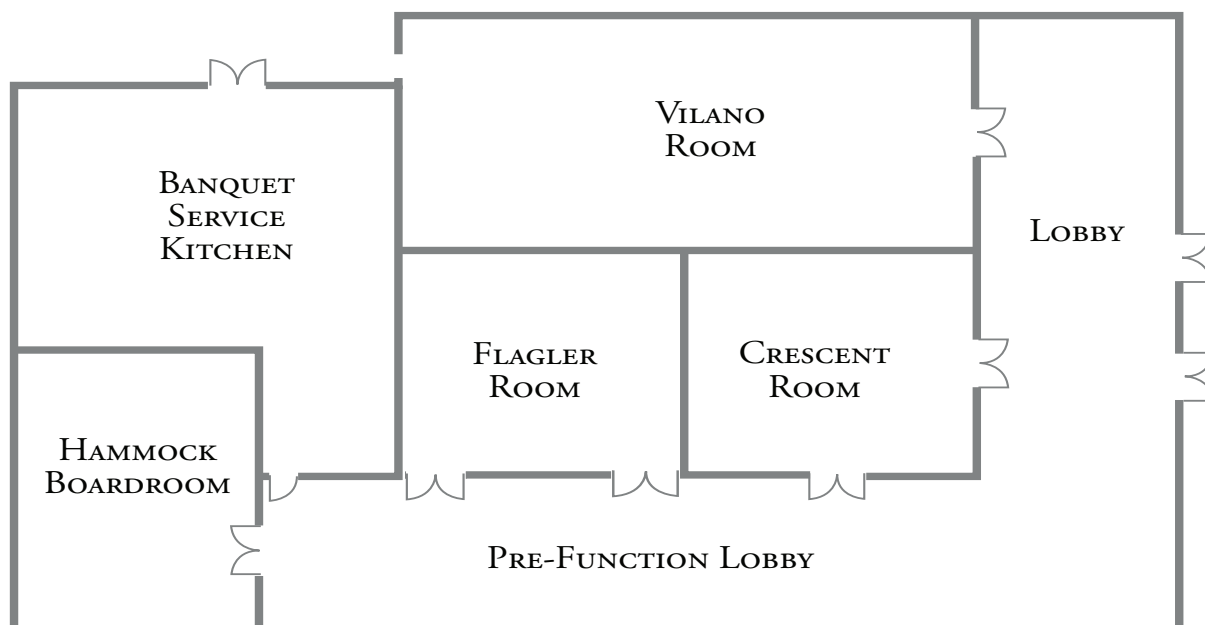
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OCEAN BALLROOM



ATLANTIC BALLROOM



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2026 MEETING PARTICIPANTS

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2026 MEETING PARTICIPANTS



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