

INCREASE YOUR INCOME

A Charitable Gift Annuity with the New Mexico Conference Methodist Foundation may help you increase your annual spendable cash, cut your current income taxes, and make a significant gift to your favorite United Methodist institution and/or congregation. The annuity rate is determined by your age at the time you create your gift annuity.

Here is a sampling of current rates and benefits for a single life gift annuity created with \$10,000 cash:

Age	Payout Rate	Annual Income	Tax-free Portion	Charitable Deduction	Effective Return Rate *
60	5.5%	\$ 550	\$298	\$2,801	7.2%
65	5.7%	\$ 570	\$328	\$3,432	7.7%
70	6.1%	\$ 610	\$377	\$3,966	8.5%
75	6.7%	\$ 670	\$442	\$4,464	9.6%
80	7.6%	\$ 760	\$532	\$4,943	11.2%
85	8.9%	\$ 890	\$667	\$5,392	13.5%
90	10.5%	\$1,050	\$818	\$5,911	16.4%

* This rate represents an equivalent, fully taxable yield in the 28% bracket calculated with the Applicable Federal Rate for August 2008. Actual numbers may be slightly different, depending on federal discount rates at the time of the annuity's creation.

Note: These rates are recommended by the American Council on Gift Annuities. Rates for a two-life gift annuity are lower and are available upon request.



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The CORNERSTONE

...helping United Methodists build for the future

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Understanding Your Foundation

The New Mexico Conference Methodist Foundation may be a mysterious, or even totally unknown, entity to some United Methodists. But services offered through the Foundation are a valuable asset not only to individual churches, but also to individual church members interested in planned giving.

The Foundation can help churches raise funds or maintain funding through the use of managed accounts that support functions and ministries of Methodist congregations and institutions.

Using prudent investment methods, rather than plunking donor contributions into a regular savings account, can mean much greater dividends for the long-term. Self-perpetuating endowments established by a church or a church member through the Foundation can continue funding one or more ministries long beyond the lifetime of one church member, pastor or finance committee term.

Foundation services move beyond simply establishing and managing planned giving investments. It also assists with estate planning; manages the *Methodists Helping Methodists* loan program; provides training for finance committees and in the Good Sense budget course; and provides counsel for capital stewardship programs.

The *Joyful Steward* is provided monthly to help church staff who prepare bulletins and newsletters. Special topical brochures and booklets in support of ministries or events also can be



Photo by Suzanne Bennett, NMAC

Left to right: Foundation staff ready to serve and assist are: Molly Emkes; Marilyn Large; Sanford Coon; standing, Jennifer West

designed and produced from the Foundation office. More than 500 12-page promotional booklets were prepared at no charge for McCurdy School's gala in February. More than 67,000 bulletin inserts highlighting 12 Shared Ministry topics were designed and have been distributed free to churches requesting them. More than 5,000 free year-end giving brochures were designed, produced and distributed from the Foundation office near the end of 2007. And, the Foundation also distributes electronic issues of *The Parish Paper* and hard copy issues of the *Clergy Finance Letter* to clergy.

Foundation services also include support to its Board of Directors. The Board is comprised of church members from congregations throughout the Conference. They meet three times annually, with committee sessions and full board sessions to examine, discuss and plan.

The Communications staff also updates and continually strives to include useful, interesting and updated Web site information. The site includes comprehensive planned giving information as well as links to UM sites, publications including Herb Miller's *The Parish Paper* and *e-Legacy* newsletter and issues of *Cornerstone* newsletter. Visit the Foundation site at www.nmcmfi.org.

Executive Assistant, Molly Emkes, manages financial records, fulfills fund distributions, and prepares tax statements to annuitants and other fund holders.

To reach the Foundation staff, call 800/678-8786 or 505/255-8786. Reach Rev. Sanford Coon, Executive Director, at ext. 115 or e-mail sanford@nmcmfi.org; Executive Assistant Molly Emkes at ext. 114 or molly@nmcmfi.org; Director of Communications and Outreach Marilyn Large in Las Cruces at marilyn@nmcmfi.org or toll-free at 866/701-8191; or Communications Assistant Jennifer West at ext. 113 or jennifer@nmcmfi.org.

FOUNDATION FOLKS AT WORK



Left: Rev. Sanford Coon, Executive Director, and Marilyn Large, Director of Communications, Outreach, prepare visual aids for the November 2007 Foundation Board of Directors retreat in Santa Fe.



Right: Executive Assistant Molly Emkes, left, visits with the Texas Methodist Foundation's Candy Gross at her display during Annual Conference.

Below: Sanford Coon and Molly Emkes, left, join board members, listening to retreat facilitator Martha Benn of De La Porte & Associates, guiding members in assessing goals and vision for the Foundation.



Right: AC 2008 was held at the Glorieta Conference Center Holcomb Hall; left, Molly Emkes arranges the Foundation display where popular coffee is served; left, below, Jennifer West, communications Assistant, helps serve; middle: Sanford Coon swaps ideas with Texas Methodist Foundation's Dr. Darrell Loyless, vice president of advancement.



Right: Along with board member Rev. Jane Vaughan of Alpine UMC and newly elected board vice president Tom Toews, Sanford Coon considers a discussion topic presented to the board during November 2007 retreat.

Foundation Figures at a Glance

Growth: \$2,231,504 in 1984 \$40,846,043 in 2007
Funds managed: 223 church accounts; 157 institution accounts; 92 active gift annuities and trusts
Distributions: since established in 1970, \$4.9 million to the N.M. Conference; \$2.6 million to ministries.

Foundation Officers & Board Members

Officers

President
LaDoyce Lambert
Odessa, Texas

Vice President
Thomas Toevs
Albuquerque, N.M.

Treasurer
Richard Wallace
Albuquerque, N.M.

Secretary
Barbara Bauernfeind
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John Headrick
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Albuquerque, N.M.

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Las Cruces, N.M.

Rev. Jeff Lust
Albuquerque, N.M.

Max Myers
Santa Fe, N.M.

Toby Rue
Las Cruces, N.M.

R.Finn Smith
Hobbs, N.M.

Sid Strebeck
Clovis, N.M.

Nancy VanDevender
Albuquerque, N.M.

Rev. Jane Vaughan
Alpine, Texas

Ex-Officio

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D. Max Whitfield
Albuquerque, N.M.

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Rev. James Hawk
Albuquerque, N.M.

Director of Mission & Administration
Rev. William Sylskar
Albuquerque

**Notes from the Executive Director
Rev. Sanford Coon**



**VIEWING THE FOREST
AND THE TREES**

There is a common saying that's applicable when we get so caught up in the minutia of a situation that we are unable to glimpse a more comprehensive perspective: "One can't see the forest for the trees." In this issue of **Cornerstone**, we hope you'll see both the diverse, separate services we provide as well as the cohesive breadth of services provided to individuals, families, congregations, and institutions of our Conference.

In 1965, when the Conference authorized the formation of the Foundation, three areas of service were identified: investment management, planned giving, and stewardship education. Those three services continue to be mainstays in our ministries. We are clear that our mission is to serve our various constituencies, whether it is a single individual or the Conference as a whole. In our mission statement we acknowledge that one of the ways we do that is by "maintaining faithfulness to God's covenant and openness to God's guidance."

Over the past years, the Board and staff of the Foundation have sought to discern that divine guidance, and it has brought us through some fascinating deliberations and decisions. We have expanded our areas of service to include loans, consultation on capital stewardship programs, individual and family financial management, training of local church committees on finance, safe debt projection, development of endowment programs, provisions of information about shared ministries and other life-transforming ministries in our Conference. I consider these to be the trees—each making its individual contribution to the wholeness of the forest.

Most Foundation services are provided without cost. Yes, we do have a management fee on almost 400 accounts. There's a fee for developing plans and guiding a capital stewardship program, and interest is charged on loans. But there's no cost to set any of those arrangements into motion. We've worked with scores of congregations in trainings and consultations, all without charge.

In an interval of volatile financial turmoil in our country and globally, it may be timely for each pastor, finance committee and trustee chair, and lay leader to consider how the Foundation can serve you through the turbulence.

We invite you to inspect the trees and make use of the products of the forest!

Congrats!

Rev. Jane Vaughan, left, with Bishop Max Whitfield, was among ordinands at the June 2008 Annual Conference at Gorieta, N.M. Rev. Vaughan is pastor at Alpine, Texas, UMC and a Foundation Board member.



Photo by Karla Abernethy-Theford

Welcome!

The Foundation and its Board of Directors welcome ex-officio board member **Rev. Bill Sylskar**, Director of Mission and Administration for New Mexico Annual Conference.

The Foundation and its Board of Directors welcome the newest board member, **Thomas Archibald** of Artesia, N.M.

Foundation Expands

Marilyn Large is the Foundation contact for the new Las Cruces office. As Director of Communications and Outreach, she continues offering presentations on planned giving, providing training to Finance Committee members and assisting churches and individuals to establish endowments and other funds. Contact Marilyn toll-free at 866/701-8191 or marilyn@nmcdfi.org.

Asset Allocation as of 30 JUNE 2008

MANAGER	AMOUNT	PERCENT
Aletheia (Large Cap Value)	\$ 2,263,273.15	5.9%
Alliance Bernstein (Int'l Fund)	\$ 1,970,599.15	5.1%
Denver (Small Cap Value)	\$ 1,306,327.31	3.4%
Harris (Large Cap Value)	\$ 2,581,007.69	6.7%
Loomis (Large Cap Growth)	\$ 3,648,856.70	9.4%
MFS International (Int'l Fund)	\$ 995,216.86	2.6%
Victory (Large Cap Core)	\$ 2,633,174.12	6.8%
Wentworth Hauser & Violech (Small/Mid Cap Growth)	\$ 2,739,977.56	7.1%
Hartford (Mid Cap Core)	\$ 360,931.55	0.9%
Euro Pacific Fund (Int'l Fund)	\$ 2,834,683.34	7.3%
Alternative Investments	\$ 3,191,480.41	8.2%
Bond Fund of America (High Yield Bonds)	\$ 1,978,203.90	5.1%
Delaware Diversified (High Yield Bonds)	\$ 2,107,942.24	5.4%
Alliance Bernstein Global	\$ 994,213.34	2.6%
Pimco Tips (Investment Grade Bonds)	\$ 1,231,791.22	3.2%
Pimco Total Return	\$ 4,436,835.35	11.5%
Gov't Securities	\$ 1,771,968.94	4.6%
Cash, Loans Receivable & Accruals	\$ 1,640,055.91	4.2%
Total	\$39,017,886.00	100.0%

We're Here to Serve YOU!



Director of Outreach & Communications/Las Cruces office: Marilyn Large
Services and products; finance committee training; Web site; Joyful Steward; assistance in establishment of funds
marilyn@nmcdfi.org



Executive Director: Sanford Coon
Oversees Foundation operations; finance committee training; endowment committee training; stewardship development; Good Sense budget course training; capital campaign consultation; planned giving
sanford@nmcdfi.org

Communications Assistant: Jennifer West
Admin support; design/graphics for interpretive resources and Cornerstone layout; database management; coordination of distribution of resources and printed materials
jennifer@nmcdfi.org



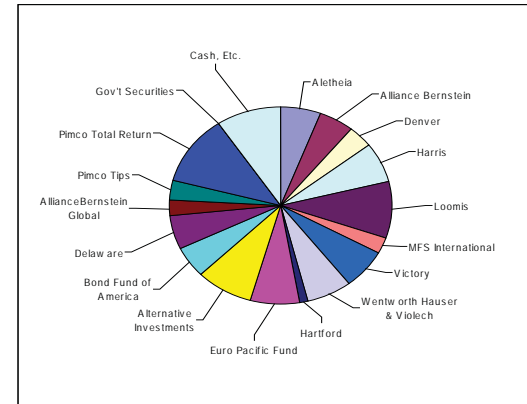
Executive Assistant: Molly Emkes
Manages financial records of funds and Foundation operations; coordinates establishment of funds
molly@nmcdfi.org



Fundholder monthly account statements Online by request
Contact Molly Emkes
molly@nmcdfi.org
800-678-8786 or 505-255-8786

Foundation Services for You

- Will Bequests
- Estate Planning
- Charitable Gift Annuities
- Establishing Endowment Funds
- Donor Advised Funds
- Giving Securities
- Giving through Life Insurance
- Giving for Income



Member of the National Association of United Methodist Foundations

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STAFF TO SERVE YOU

Rev. Sanford Coon
Executive Director

Molly Emkes
Executive Assistant

Marilyn Large
Director of Communications & Outreach

Jennifer E. West
Communications Assistant

Dear Marilyn:
I am interested in receiving further information about the following:
 Making a Will Estate Planning Donor Advised Funds
 Establishing an Endowment for: My Church A Specific Ministry
 Advantage of Giving Appreciated Stock (Securities) and Property
 I am interested in receiving the free eNewsletter, "GiftLegacy"
 I wish to receive **The Cornerstone** Newsletter, discontinue or change address
 Please send the Wills and Trust Planning Guide
 I have a request:

Name: _____ Date: _____
E-Mail: _____ Phone: (____) _____
Mailing Address: _____ City: _____
State: _____ Zip: _____