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	5.0%	$ 500	$325	$2,135	6.7%
65	5.3%	$ 530	$358	$2,829	7.3%
70	5.7%	$ 570	$404	$3,531	8.1%
75	6.3%	$ 630	$467	$4,158	9.2%
80	7.1%	$ 710	$547	$4,808	10.7%
85	8.1%	$ 810	$655	$5,478	12.6%
90	9.5%	$ 950	$785	$6,074	15.1%

* This rate represents an equivalent, fully taxable yield in the 28% bracket calculated with the Applicable Federal Rate for May 2009. 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.

The New Mexico Conference Methodist Foundation Incorporated

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BOARD HIGHLIGHT

Joining the Foundation's board of directors in 2007, **Sid Strebeck** currently serves as chairman of the board's Task Group on Seminary Scholarships, a committee with a mission close to his heart.

Sid is a lifelong resident of Clovis, N.M., where he and high school sweetheart **Selena** have shared marriage for 35 years. They are members of Kingswood United Methodist Church.

Currently "first-year empty nesters," the Strebecks raised four boys of whom they are intensely proud: **Ryan**, a student at Asbury Seminary in Kentucky; **Brent**; **Jordan**; and **Layne**, a student at Texas Tech.

Sid brings diverse experience to the Foundation board, having been a rancher, farmer, real estate developer and general contractor. He holds a bachelor of science degree in agricultural economics from New Mexico State University. Sid owned seven new car dealerships over a span of 25 years before selling the last dealership in May 2008. "Then I had to find a place to call my office!" Sid said. His loss of office space and the hours required in his last dealership did not bring the additional family time that might be expected. Sid is a man constantly exploring new opportunities.

> *"Our management practices insure that funds we hold will be available for God's ministry when they are needed."*

"The Foundation serves a great purpose in being stewards of the funds entrusted to us," Sid notes. "Our management practices insure that funds we hold will be available for God's ministry when they are needed."

Sid's goal as a board member is to ensure that scholarship assistance can be available to anyone who is truly called into ministry. On their graduation from seminary, new clergy will "not be saddled with an overwhelming debt" if funds have been established through the Foundation to help promising future clergy. Endowments and trusts managed by the Foundation for churches, the Conference and individuals can make assistance a reality.

As a member of the Foundation board, Sid has been part of crafting a recruitment process to reach people who have been called into the ministry.

Favorite scripture:
Isaiah 55:10

The New Mexico Conference Methodist Foundation Incorporated

The CORNERSTONE

...helping United Methodists build for the future

Volume 8 Number 2 May 2009

Trusts

Through Your Lifetime
After Your Lifetime

Trusts. How serious and legal that sounds! Simply stated, a trust is a tool that helps transfer property when multiple interests and objectives are involved. A trust is like an "artificial person" who owns and manages property for a period of time for the benefit of one or more people or entities.

A trust can provide a fixed or variable income for you and others you select for life or a period of time. It can also delay distribution of our assets to loved ones until a condition is met or an age is reached. It can make charitable gifts in ways that help you first provide for financial needs.

A trust can help families avoid the chaos that can happen following death of their loved one who has assets to distribute. A trust will ensure assets you've gathered during your life are given according to your wishes and directions.

Types of trusts include: Charitable Lead Trust and Charitable Remainder Trust (as Annuity Trust or Unitrust).

A Charitable Lead Trust can direct your assets to support a ministry over a period of years you've specified, temporarily providing income to a United Methodist interest. When the trust terminates, the assets are returned to you or those you've named (e.g., children or grandchildren).

A Charitable Remainder Trust pays a fixed amount annually or an amount that changes each year. The annuity trust offers the certainty you will receive the same annual payments, while the unitrust is more flexible with payouts to meet your needs and could increase your income stream over time with its growth.

T.J. Sivley of Artesia, N.M., established a Lead Trust in 1995. He designated emergency and missional ministries of the New Mexico Conference to be among the recipients of annual distributions. Through the years of the trust, the Conference Board of Global Ministries received and distributed more than $147,000 in grants to ministries in the Conference. When the life of the trust terminated after 10 years, Mr. Sivley's assets reverted to his designated individuals or entities.

Like Mr. Sivley, United Methodists can use trusts to support UM ministries during their lifetimes and from their estates when they've passed away.

The Charitable Lead Trust allows donors to care for their families, churches and ministries.

Call the Foundation to learn more about trusts and other methods for giving, or visit the web site at www.nmcmfi.org to explore and compare using the GiftLaw Calculator in "Gift Planning" and "Create Your Plan" at the left of the screen.

Bevan Charitable Remainder Unitrust

In April 1997, Rees and Marilyn Bevan made the decision to support their United Methodist church by establishing a trust. They have attended St. Paul's United Methodist Church in Albuquerque since the 1970s.

The Bevan Charitable Remainder Unitrust was established with $700 in cash and a rental property appraised at $110,700 in the late 1990s. The Bevans desired for the trust to support their church with future repairs, maintenance and improvements, along with funding scholarships to St. Paul's members in college or seminary who plan to work full-time in mission, outreach or other Christian service. The Bevans have received annual distributions that they believe reflect closely what they expected to earn as landlords--without problems or complaints that can be part of renting property.

Continued inside

Notes from the Executive Director Rev. Sanford Coon

WHERE'S LEO?

Ever heard of "Leo the Great"? Leo was born in Rome around 400. At the time of his election to be pope in 440, the church was besieged by multiple heretical doctrines. So, Leo boldly called a massive Council at which he supplied the language that settled the long debated issue of the dual natures of Christ. Leo insisted that Christ was one Person, in whom two natures, human and divine, were united. That theological thread is central in the fabric of our understanding of Jesus to this day.

There were other troubles that Leo faced when the armies of Attila the Hun advanced on Rome. Leo went out unarmed to meet the notorious warrior and persuaded him to withdraw his armies. Later, the Vandal Gaiseric brought threat. This time Leo was not so successful in persuasion, except he was able to get them to agree to only pillage Rome and not burn it. Much of the remainder of Leo's tenure as pontiff of the Roman church was spent in ministering to the victims that were left behind. He died in 461. So revered was Leo that he earned the title "the Great," and thus is one of only three popes to have been so recognized.

Why focus on an ancient pope? Leo was a bold visionary. He knew God's calling and lived it in such a way that nothing could diminish his trust in God or waylay him on his faith journey. I suggest that in this way he is a model for each of us. When we are anxious about the current economic chaos through which our world is moving, I think Leo's convictions to serve God boldly and generously might well be a model we could emulate. It would be easy for us to fearfully retreat and complain because our diminished financial assets might never be regained, our job might be in jeopardy or already eliminated, our college savings might be destroyed, our retirement funds might have been ravaged as truly as ancient Rome was ravaged.

The alternative that we have is to choose, as Leo chose, to move outside the walls that we thought provided protection, such as some notion about "financial security," that we now realize were barriers. To live outside the walls is to move to fresh clarity about our values and to affirm that God will provide that which we need in order to do all that God calls us to do. It's not always going to be what we want, but it is divine sufficiency, now that we realize unbridled consumption is corrupt and holds no worthy promise for us.

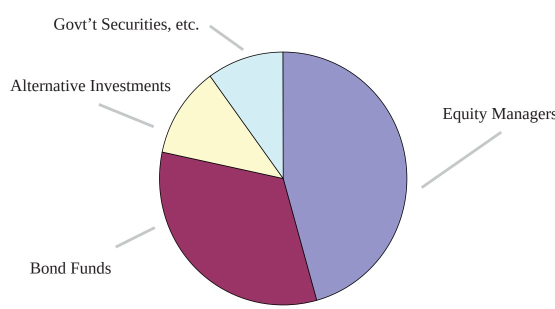
Board Welcomes New Members

The Rev. David Weyant of Odessa, Texas, joined the Board of Directors February. Rev. Weyant brings his experience as an ordained Elder, as superintendent of the Odessa and El Paso districts and as chair of the Board of Ordained Ministry. Along with his services as pastor, he also has served on numerous district committees and as an alternate delegate to Jurisdictional Conferences.

Laura Armstrong of Belen, N.M., joined the Board of Directors February. Mrs. Armstrong brings her professional expertise as a Certified Public Accountant. Her background also includes her life experience as a pastor's spouse and church positions as youth, choir and bell choir director.

ASSET ALLOCATION AS OF MARCH 31, 2009

INVESTMENTS	AMOUNT	PERCENT
Equity Manager	$ 12,527,474	46%
Bond Funds	$ 8,947,692	33%
Alternative Investments	$ 3,276,649	12%
Gov't Securities, Cash, Loans Receivable & Accruals	$ 3,117,087	11%
TOTAL FUND VALUE 3/31/09	**$ 27,463,732**	**100.00%**



IRA Rollover, Giving Amendments

Partnership for Philanthropic Planning, April 3, 2009

When the Senate approved its fiscal year 2010 budget resolution (S. Con. Res. 13) on April 2, it adopted three important amendments dealing with charitable giving.

An amendment by Sen. Byron Dorgan (D-N.D.) called on Congress to extend the IRA Charitable Rollover provision and expand it to allow for life-income gifts. Inclusion of the IRA Charitable Rollover and mention of life-income gifts in particular represents a significant step towards a permanent and expanded rollover.

Two separate approved amendments emphasize support for tax incentives for charitable giving. These amendments were offered in response to President Obama's proposal to decrease the charitable deduction for families earning more than $250,000 in order to finance new health care proposals.

One amendment was introduced by Sen. Robert Bennett (R-Utah) to bar changing current tax laws to pay for healthcare reform with charitable contribution deductions. A second amendment, introduced by Sen. John Thune (R-S.D.), ensures that organizations providing religious, educational, cultural, healthcare and environmental services are not harmed by changes to the charitable giving deduction. This amendment received a recorded vote, with 94 Senators voting in favor. The House and Senate go to conference to reconcile differences between the two resolutions.

FREE YEAR-ROUND

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sanford@nmcmfi.org
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Bevan Unitrust continued from front page

"There are expenses to (establish a trust)," the Bevans said. But, they believe the cost was considerably less than they would have paid for expenditures for professional maintenance through the years on their property.

After the Bevans pass away, their distributions will begin benefitting their church. Through the years of the trust, they have not felt any sense of sacrifice or hardship from making their gift.

They could have sold their property and then donated to the Foundation to establish a fund. But, they said, there were "worthwhile tax implications" by giving their property directly to the Foundation and they did not lose a sizeable portion of a cash gift through taxes.

This form of giving was "certainly seamless for us," Mrs. Bevan said. Much of the success and ease, she emphasizes, was due to their property being in "impeccable condition" and that it sold very quickly.

For others considering a trust, the Bevans note the importance of having a home that is "free and clear," in good condition and setting a realistic sale price.

The New Mexico Conference Methodist Foundation Incorporated

Member of the National Association of United Methodist Foundations

11816 Lomas Blvd. NE, Albuquerque, NM 87112
Phone: 800-678-8786 or 505-255-8786
Fax: 505-265-6184
Las Cruces office: 866-701-8191
web site: www.nmcmfi.org

STAFF TO SERVE YOU

Sanford Coon
Executive Director

Molly Emkes
Executive Assistant

Marilyn Large
Director of Communications & Outreach

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Communications Assistant

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( ) Establishing an Endowment for:
( ) My Church ( ) A Specific Ministry

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