

## Why Give?

- ◆ A gift to the Foundation keeps on giving year after year. That's because the Foundation maintains the principal in the primary fund, spending only the income.
- ◆ A donation is tax deductible. You may also help your family save on estate taxes.
- ◆ The Foundation has been a lifesaver, funding many unbudgeted but crucial church expenses, including plumbing repairs, new compressors, new carpet, kitchen upgrades and parking lot repairs.

Those are practical reasons. But generosity of this sort is a matter of both the head and the heart. **We give because it means something to us:**

**We give to recognize a church** that has joined us on our faith journey, that has helped us weather life's storms, and that has celebrated life's blessings with us.

**We give to establish a legacy.** Let future generations share the blessings and learn about God's love.

**We give to honor people** who have touched our lives in ways that can't be counted.



"The church does not operate for free or on magic."

**Scott Davis**

**We give because we believe in the future,** and we want to ensure that there will be a platform to share Christ's message in southwest Fort Worth long after we're gone.

**We give because we recognize that people before us planted the seeds,** and we owe it to them to pass that blessing forward.

**We give because we know people need us.** From this campus, our missions and ministries touch lives in our community, our state, our nation and our world.



"It's a joy to give back to God what belongs to Him."

**Leta Sikes-Davis**

**We give to let the world know** what's truly important to us.

**Won't you join us in giving?**

## Mission of the Arborlawn Foundation

To advance God's church and to further the Christian ministry of Arborlawn United Methodist Church through the development and administration of funds for improvement of church properties and other donor-designated purposes.

**For more information, contact our senior pastor:**

**Rev. Chris Mesa**  
Chris@ArborlawnUMC.org  
(817) 731-0701

**Or visit any member of the Foundation Board:**

**Bob Pence**, president  
**Steve Pike**, vice president  
**Hal Smith**, vice president of development  
**Susan Stevenson**, secretary  
**Elaine Anderson**, treasurer

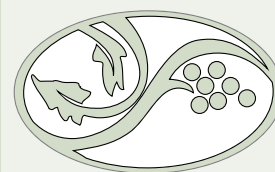
Cindy Boyd  
Leta Sikes-Davis  
Bill Ellis

Gary Jack  
Terry McClure  
Rex Seline

Bob White  
Scott Wilcox  
Deborah Wilkinson

The Arborlawn United Methodist Church Foundation Inc. is a Texas nonprofit corporation, recognized as a tax-exempt charitable organization under Internal Revenue Code Section 501(c)(3). All gifts are tax-deductible.

**Please join us in investing in the future of Arborlawn United Methodist Church.**



**ARBORLAWN**  
FOUNDATION

*On this rock, we will build.*

5001 Briarhaven Road  
Fort Worth, TX 76109  
www.ArborlawnUMC.org/Foundation



**What is the Arborlawn Foundation?**

**How does it help the church?**

**How you can help.**

**ARBORLAWN**  
FOUNDATION

*On this rock, we will build.*

## What is the Arborlawn Foundation?

At home, you may set aside some savings – just in case. You'll handle groceries, movies, clothing and church donations from your regular "operating" budget, which is probably a checking account. But if your air conditioner conks out or your roof springs a leak, you may need to tap the "just in case" savings.

In that context, the Foundation is the "just in case" fund for our church.

More formally, the Arborlawn United Methodist Church Foundation was established primarily to create a large, permanent fund to cover the costs of maintenance and improvements on our property. It holds permanent endowments and other designated gifts separate from the church operating budget. The Foundation is overseen by an independent board of directors, all of whom are members of the church.



**The Arborlawn Foundation is tax exempt, meaning your contributions are tax deductible.**

## How the Foundation Works

Contributions not designated for specific projects are held in the "primary fund," which includes interest-bearing accounts and prudent investments. That fund is dedicated to maintain, improve or expand the church's property, which can include repayment of debt. In that fund, only income from the investments — interest and dividends — may be spent. That leaves the balance intact to generate income year after year.

For instance, using round numbers, let's say the investments generate 5 percent in income each year. For every \$100,000 in the primary fund, the Foundation could spend up to \$5,000 on church projects.

Donors may also designate specific purposes for their contributions, including such things as music programs, ministries for children and students, or playgrounds. The Foundation will hold and manage these "donor-designated" funds as donors specify.

**The Foundation had assets valued at about \$930,000 as of Sept. 30, 2018.**

## How the Foundation Helps Arborlawn

It typically starts with a request. Let's say one of the many air conditioning units on the roof gives up on a hot summer day. These are not small units like those you might have at home. No, these are huge and expensive industrial units.

Our hard-working staff — sweating without the AC — would alert the House and Grounds Committee, which would approach the Finance Committee. That group, in turn, could go to the Foundation board. If Foundation funds are available, the board will say, "Don't sweat it! We've got you covered."

Many projects funded by the Foundation are, well, not very glamorous, unless you consider plumbing and fire sprinklers glitzy. But even mundane needs deserve our love, too.

Because the Foundation has taken a low-key approach to its work, you may not realize the extent of what it has funded. Here are samples of projects funded since 1994:

Year	Project	Amount
1994	Plumbing and sewer work	\$7,590
1996	Carpet, Sunday School rooms	\$16,323
2000	Parking lot improvements	\$4,000
2002	Replace hot water tank	\$3,008
2003	Fix gas leak	\$9,300
2004	New doors	\$9,332
2006	Remodel kitchen, SAM building	\$13,175
2008	Children's area improvements	\$45,389
2011	Signage	\$41,733
2014	Sprinkler system, SAM building	\$30,000
2015	Organ fire suppression system	\$39,000
2015	Special music	\$10,000
2016	Replace air conditioner	\$20,000
2018	Replace air conditioner	\$13,500

**Since its inception, the Foundation has funded over \$590,000 in projects. You can help us do more!**



*On this rock, we will build*

## How to Give to the Foundation

### Ways to give:

- ◆ Memorials and honorariums
- ◆ Cash gifts of any size
- ◆ Stocks, bonds or securities
- ◆ Investment real estate
- ◆ Personal homes
- ◆ Life insurance contracts
- ◆ Bequests or charitable trusts

**A gift to the Foundation is different than a regular offering that goes to the operating budget.** Some people do make regular gifts to the Foundation – monthly or quarterly – on top of their contributions to the operating budget. Many make honorariums or memorial gifts, especially when a family designates the Foundation. Large gifts are often made through wills and trusts.

Cash gifts are simple. If you want to give something else, you have many options, including these:

### Giving through wills and trusts

It's easy to include the Foundation with a brief addition or amendment to your will. Gifts in wills and living trusts are flexible and may be changed with life circumstances. You can give a specific amount or percentage of your estate, or designate specific property. There is no limit on amounts deductible from federal gift and estate tax for these gifts, and no tax is due on assets given this way.

### Giving your home

Families are spread far and wide these days. Your family may not want the "family home" when the time comes. You can designate it for the Foundation and still stay in it as long as you'd like. And because you are making an eventual charitable gift, you qualify for an immediate income tax deduction. You still maintain the property and pay taxes, but it will not be part of your taxable estate, which may save your heirs on the estate tax. Or you can donate your home to the Foundation when you no longer need it.

### Giving securities

Stocks, bonds, mutual funds and other securities you have owned for more than a year make convenient gifts with potential tax advantages. If you sell securities that have appreciated over time, you could owe substantial capital gains taxes. But if you give the securities to a charity like the Foundation, you may avoid the tax while obtaining a federal tax deduction for the full value of the securities.

### Giving through life insurance

Using life insurance can amplify your gift. Relatively modest annual premiums mature into a substantial death benefit. When a charity owns the policy, the donor gets a tax deduction on the cash to pay premiums. For example, for a donor in a 25% tax bracket a \$2,500 gift really costs \$1,875 when factoring in the tax deduction. Another option is to name the Foundation as beneficiary of an existing policy.

**Foundation board members will be happy to answer questions. We also encourage you to discuss your decisions with your family, financial planner or lawyer.**