For the Love of God everywhere

LET’S TALK MONEY

Stewardship and Generosity Presentation
with Jim Ducker and Sheri Meister

Dakotas | Minnesota
METHODIST FOUNDATIONS

Our Team

Jim Ducker

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Welcome

- **Purpose of the Series:** This four-part journey is about equipping churches to talk openly about money, generosity, and mission in ways that are spiritually grounded and practically sustainable.
- **Today's Focus:** To build a healthy, thriving church, financial stability is essential. This begins with clarity of mission, sharing your church's story in meaningful ways, and inviting others to invest in that mission through generosity and engagement.

Foundation & Annual Conference Partnership

The Foundations were established to provide a means of supporting various ministries of the Dakotas and Minnesota United Methodist Annual Conferences, as well as your local church.

Matthew 6:19-21

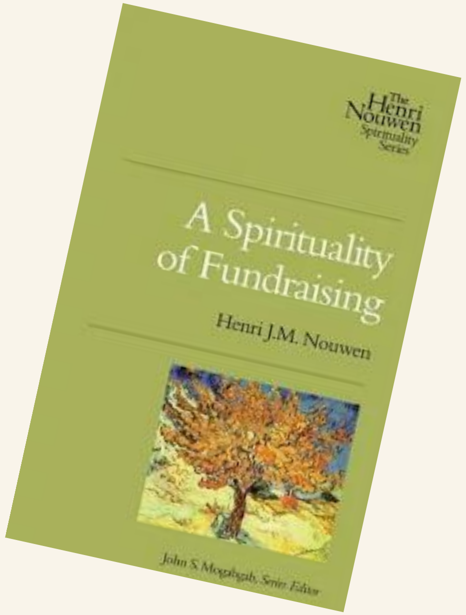
19 “Do not store up for yourselves
treasures on earth, where moth and rust
consume and where thieves break in and
steal; 20 but store up for yourselves
treasures in heaven, where neither moth
nor rust consumes and where thieves do
not break in and steal. 21 For where your
treasure is, there your heart will be also.

John Wesley

- Earn all you can
- Save all you can
- Give all you can

Henri Nouwen

"Fundraising is proclaiming what we believe in such a way that we offer other people an opportunity to participate with us in our vision and mission."



Questions to ask Yourself and Your Church Leaders

- What is your church mission?
- What plans do you have for the money raised?
- Have you visited with your congregation about including the church as a beneficiary in their will?

Building Relationships

- Pray and Prepare
- Know Their Story
- Find Common Purpose
- Connect
- Personally Share Impact

Building Relationships (continued)

- Show Gratitude
- Be Transparent
- Invite Participation
- Celebrate the Gift
- Sustain the Relationship:


Nothing is more expensive than a missed opportunity.
H. Jackson Brown

Charitable Giving

Americans donated $592.5 billion to charitable causes in 2024.

1987

53% of all charitable giving was for religious organizations.

2017

Religious giving dropped to 31% of all charitable giving.

2024

Religious giving dropped to 23% of all charitable giving.

Charitable Giving

Americans donated $592.5 billion to charitable causes in 2024.

Why are people giving to other organizations over the church?

- There are now more non-profit organizations.
- More options for charitable giving –

- We're unclear of our mission.
- We don't tell our story
- We haven't given them a reason to give

We don't ask!!!!

A Christian Approach

Churches are the most overlooked charities in estate stewardship.

- Estate planning offers individuals the opportunity to make an eternal statement of faith.
- This act of stewardship can leave an unforgettable mark on your Church.
- Even small assets can be turned into a gift which will support the ministry of your choice in perpetuity.

Legacy & Estate Planning

- The process of managing accumulated assets for the present and the future.

- It is a written expression of your intentions for the protection and preservation of your assets during your lifetime and their management and distribution upon your death.

Is a Will an Estate Plan?

A will is the cornerstone of a sound plan, but alone it does not make it an estate plan.

What to include in an Estate Plan?

- Decisions regarding guardianship for dependent children.
- Identify the Power of Attorney.
- A healthcare proxy with the responsibility of making medical decisions.
- A living will directive.

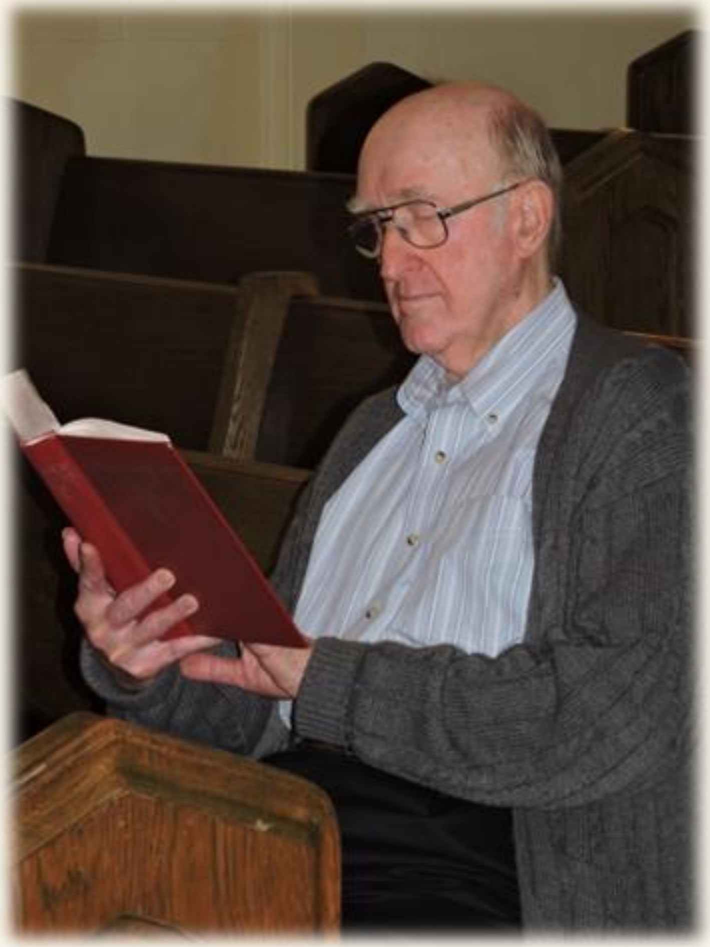
Examples of Charitable Giving

- Endowment Funds
- Restricted Funds
- Unrestricted Funds
- Direct-giving
- Life Insurance
- Real Estate or Land

Dakotas United Methodist Foundation

Charitable Remainder Trust

Bob is
The guy sitting
next to you in
the pew!



Matthew 6:21

For where your treasure is,
there your heart
will be also.

Endowments

- Unrestricted endowment gifts invested in the Foundation are to ministry as retirement investments are to individuals
- Endowment gifts are never spent. The gift remains intact and only the interest income is available for ministry in your local church.

Endowments

- The principle/corpus (money allocated to the account) of an endowed fund is generally not used to fund annual operating expenses.
- The goal of an endowment is to allow the principle to grow without withdrawals so the underlying corpus (or allocated funds) increases over time.
- The interest earned from the account is then available every year and should be used to enhance ministry in line with the stated purpose of the endowment.

Endowments

How to make the most of Mrs. Smith's $100,000 gift.

- Is the missions committee in line with the goals of your church?
- Is the leadership team/administrative board aware of the gift?
- Sometimes we get stuck in our definitions and in our beliefs of how it "should" be. And miss the opportunity of how it "could" be.

Myth

Money raised for an endowment or investment account takes away from the weekly offering.

- Investment accounts are for monies over and above the annual budget.
- Parishioners should not take from their commitment to the church to support the Foundation.

People in the pews should be paying the light bill!!!

Thank Yous

To our **donors** who make the ministries of the Foundation possible.

Thank you Lord for blessing me in all ways, in all times, with more than I need. Lead me to live generously, share joyfully, and look expectantly to my future.