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## Council on Development

West Ohio Conference  
32 Wesley Boulevard  
Worthington, Ohio 43085

Gifts of all types and any amount are most welcome by the Council on Development. Please let us know if you have questions or need help in making your gift. If you choose to give by check please make it payable to the Council on Development and mail it to:

### ▶ Council on Development

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Worthington, OH 43085  
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## West Ohio Council on Development

### Endowment Fund Management



### the mission

of the Council on Development is to equip the local church to grow generous stewards to advance the mission and vision of the West Ohio Conference of The United Methodist Church.

# Endowments

Endowments are investment funds set up by an institution in which regular withdrawals from the invested capital are used for ongoing operations or other specified purposes.

Endowment funds are often used by nonprofits, universities, hospitals and churches. They are funded by donations, which are tax deductible for donors.

Local churches, organizations, and individuals of the West Ohio Conference have the opportunity to place endowment funds with the Council on Development for investment and administration/accounting purposes.

This Endowment Program assures local churches, individuals, and other affiliated United Methodist organizations that their funds are receiving professional investment management. The Program offers the possibility of maximizing investment returns and minimizing investment expenses. Socially responsible Investment Policies, Gift Acceptance Policies and alignment of investments are in accordance with the United Methodist Social Principles and any additional guidelines adopted by our annual conference.

*The information contained in this brochure is only a brief introduction and summary. Participation in the Endowment Program should not be considered without the full information contained in the Endowment Packet. The Council on Development is more than willing to either assist you in setting up an endowment program or refine an existing program.*

Currently there are four investment "funds" available:

**Stable Fund** with an emphasis on a high level of income, and safety primarily in Treasury backed securities.

**Short Term Fixed Income Fund** with an emphasis on providing a high level of income.

**Balanced Fund** with an emphasis on providing a balance between long-term growth and current income.

**Growth Fund** with an emphasis on providing long-term growth with income.

The objectives, guidelines, and policies of each fund are further defined in the Endowment Packet. Please note that there are no guarantees with the investment results of these funds.

## The Endowment Subcommittee,

comprised of the Conference Investment Policy Committee with Council on Development representation, provides oversight for the Endowment Program.

Expenses and fees for participating in the Endowment Investment Funds are also explained in the Endowment Packet (see Endowment Investment Management Agreement).

# Packet Request:

I wish to receive a packet and more information on Endowment Fund Management.

Name:

Address:

City:

State:

Zip:

Church Name:

Phone:

Home  Work  Cell

Email:

## Mail To:

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Worthington, OH 43085

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