

United Methodist Foundation of West Ohio  
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# Legacy News

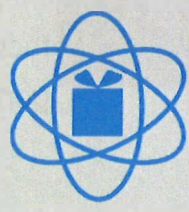


United Methodist  
Foundation *of West Ohio*

Wednesday, April 26, 2023



About Bequests



Charitable Gift Annuity



IRA Charitable Rollover

## FOUNDATION HAPPENINGS

## Foundation Takes Endowment Message on the Road

From Kettering to Ottawa Hills and Bradner to Tipp City, Foundation Executive Director Susan Black and Wespath Institutional Investments representative Karen Manckzo made the rounds to see churches in three WOC districts during March. The purpose of the visits was to bring a message about the services the Foundation offers in partnership with their new asset manager, Wespath Institutional Investments.

"We met with churches that already have an endowment with us and several that have endowments elsewhere or do not have one at all," said Susan Black. "Karen was a great resource to bring along as she could explain the difference Wespath can make to your constituents."

"My goal is to help West Ohio churches recognize that investing with the Foundation is the only way confidently ensure their resources are being invested in line with the social principles of the church," said Manckzo.

[READ MORE](#)



## The Foundation Invites You To Save The Date

Save the Date for the Foundation's Generosity Summit this fall. You're invited to join your clergy colleagues and local church leaders from across West Ohio for a two-day summit focused on growing a culture of generosity in the local church. To

learn more, click [HERE](#).

## THE FOUNDATION NONPROFIT PARTNER PROGRAM (NPP):

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## Foundation Nonprofit Program Gears Up For Third Year:

In 2021, Foundation Executive Director, Susan Black, wanted to figure out a way to highlight some of the incredible faith-based nonprofits, undertaking critical work within the West Ohio geographic boundaries. It became apparent that a great way to do this would be by revamping and restructuring the former West Ohio Advance Special Program.

“I wanted to introduce a program that would help get faith-based 501(c)3’s in front of our local churches, to potentially help align congregants with their mission ministry passions,” recalled Black.

Susan and Foundation staff, Maddy DeWitt, began a thorough vetting process of nonprofits with strong ties to the United Methodist church, and identified 5 organizations who were working to meet the needs of marginalized and disenfranchised persons while also meeting the standards established for the Partner Program. After a successful year, Black and DeWitt knew they wanted to continue the Program and increase the number of nonprofits to 7.

“One of the reasons the Program has been so beneficial is the community created between the Nonprofit Partners. It’s been great to see the way they collaborate and support one another when describing situations/initiatives within their organizations,” says DeWitt.

As the 2022-2023 Program year comes to a close in June, the Foundation has decided to expand their program to accept 10 nonprofits for the 2023-2024 year.

“By expanding our Program-size to 10 faith-based 501(c)3’s, I believe we can maximize the resources available for the Foundation Nonprofit Partner’s, and also help grow the redemptive love of Jesus Christ by supporting 3 more organizations who are working to support their community within the Conference boundaries,” said DeWitt.

Foundation Nonprofit Partners have access to the Foundation’s Nonprofit Partner Summit (An educational conference filled with presentations and resources on ways to expand and better governance, development, and programming),

educational trainings throughout the year, virtual check-in's with the other Partner's, social media coverage, and features on various Foundation communication platforms. To learn more about the program, and the current Nonprofit Partners, click [HERE](#).

If you know of a faith-based 501(c)3 within the West Ohio Conference who may qualify for this program, please email Foundation Nonprofit Program manager, Maddy DeWitt, at [momalley@wocumc.org](mailto:momalley@wocumc.org).

## UMC MINISTRIES

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### [2023 Annual Conference Will Benefit Two Critical Ministries!](#)

One of the many great things about United Methodism, is the connectional root that ties us together as brothers and sisters in Christ. Connectionalism creates a sense of community, and reminds us that fundamentally, we are here to accomplish the same goal: to make disciples of Jesus Christ for the transformation of the world. For when disciples are created, they're able to be the hands and feet of Christ in our daily life.

This year's [Annual Conference](#) will shed light on the importance of disciples, in tandem with connection, commitment, and showing up for your community, whether it be for a neighbor within your zip code, or in a different hemisphere. One of the key ways Annual Conference will illustrate the importance of this, is through the Annual Conference Offering, which will benefit West Ohio Disaster Response, and Mexico Mission Partnership.

**West Ohio Disaster Response** embodies the impact a person can have by being the hands and feet of Christ in a community. Whether it be through financial support, volunteers, or case management, West Ohio Disaster Response is ready to assist all while exhibiting the compassion of Jesus. Over the last few years, we've seen a devastating number of disasters, and time and time again, West Ohio Disaster Response is ready to work alongside local churches to provide necessary support to their communities. Click [HERE](#) to learn more about West Ohio Disaster Response, and how you can donate.



**Mexico Mission Partnership** also illuminates the impact disciples can have within a community. Over the last 20 years, members of the WOC have volunteered with a clinic in Rio Bravo, Mexico. As relationships continued to grow within the Rio Bravo community, West Ohio partnered with a local Methodist Church to support, Manos Juntas, a medical facility benefiting their community. Another ministry blossomed as a result of this partnership: Esperanza Viva (Also known as House of Hope). This ministry provides a safe place for children to live, learn, and grow. West Ohio's Volunteers in Mission (VIM) have continued to support this relationship by sending volunteer teams to support both ministries each year. Click [HERE](#) to learn more about Mexico Mission Partnership, and how you can donate.

## INVESTMENT MANAGER UPDATES

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[First Quarter 2023 Update](#)

[Watch Wespath's 2023 Q1 Investment Insights](#)

## FINANCES

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[Bank of America Reports Earnings](#)

[Treasury Yields Fluctuate](#)

[Mortgage Rates Move Upward](#)

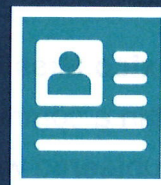


Thank you for your vested interest in helping build disciples of Jesus Christ. To access any of our resources, please go to our [website](#).

**FREE ESTATE PLANNING GUIDE**



It's never too late to plan for the people and causes you care about. Our easy-to-use estate planning guide can help you gather the information you need before meeting with your attorney.



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## PLANNED GIVING CALCULATORS

Use our online calculator to view the tax and income benefits of making a gift to support our cause. This can help you determine the best plan to meet your needs and goals.



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