

# ANNUAL REPORT 2025



UMFWO Board of Trustees November 2025

## BOARD LIST

Members Serving Between January '25 - December '25

### REV. CALVIN ALSTON

District Superintendent, Olentangy River District

### REV. ANGIE COX

Senior Pastor, Livingston UMC, Olentangy River District

### MR. EVERETT GALLAGHER

Retired Executive, Olentangy River District

### REV. WENDY HANSEN-SMITH

Exec. Dir., New Life Community Outreach, Olentangy River District

### REV. MARY L. KAY

Senior Pastor, Archbold UMC, Maumee River District

### MR. BILL LUTZ

Exec. Dir., New Path, Inc., Western Lakes District

### MR. DAVID PENNINGTON

Lay Pastor, Brushy Fork UMC, Olentangy River District

### MR. ERIC RICE, BOARD CHAIR

VP-COO, Capital Asset Management, Inc., Olentangy River District

### MRS. KAREN PERRY SMITH, GOVERNANCE CHAIR

COO, Gem City Church Collective, Western Lakes District

### MRS. SHANNON SPENCER, SECRETARY

VP for Advancement, Ohio Northern University, Maumee River District

### REV. MELISSA STEINECKER

Retired Pastor, Maumee River District

### MR. MIKE STONER

President, True North Financial Advisors, Olentangy River District

### REV. RICK STUHMER

Senior Pastor, Christ UMC Marietta, Hocking River District

### REV. DON WILSON

District Superintendent, Western Lakes District

## EX-OFFICIO MEMBERS

### BISHOP HEE-SOO JUNG

Bishop of the Ohio Episcopal Area

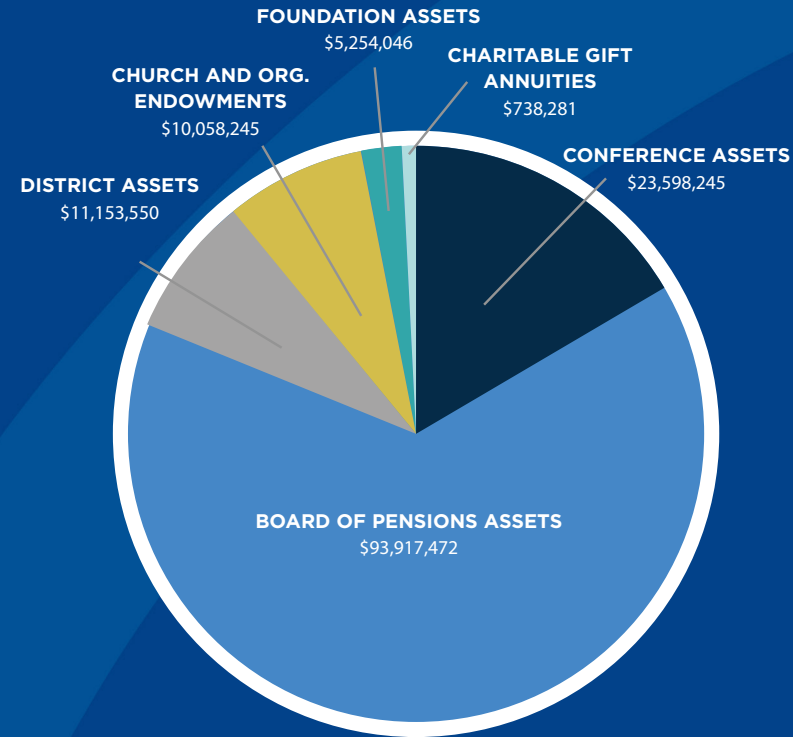
### MRS. SUSAN BLACK

Executive Director of the UMFWO

### MR. BILL BROWNSON, TREASURER

CFO and Conference Treasurer, West Ohio Conference

## ASSETS UNDER ADMINISTRATION



## INVESTMENT FUND BALANCES

Audited (2024 and Unaudited (2025))

	DECEMBER 31, 2024 UNAUDITED	DECEMBER 31, 2025 UNAUDITED
Without Donor Restrictions (Unrestricted) Net Asset	\$817,855	\$579,141
Donor Restricted Assets	\$2,972,010	\$4,359,785
Agency Investment Accounts	\$126,835,713	\$139,933,039
Other Assets	(\$288,742)	(\$152,124)
	<b>TOTAL</b>	
	\$130,336,866	\$144,719,841



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Wespath rep Karen Manczko (R), pictured with Maddy in September.



Nine of the Foundation's Alford-Cantlin Fellows embarking on their trip to Turkey in November 2025 with host Susan Black.



Honoring the long service of board chair Eric Rice in May.



Susan and Maddy at the Great Miami River District's ice cream social and ministry fair in August.



Attendees enjoying the entertainment at Generosity Summit 2025 in September.



Gaines UMC receiving the new Kingdom Builders Award at Celebration Luncheon in May 2025.



Ten clergy couples enjoyed our 2025 Clergy Couples Retreat at Mohican State Park Lodge in February.



Susan visits churches around the Conference throughout the year.



Through our investment services, stewardship and legacy giving programs, grants and scholarships, the UMFWO is working to achieve our vision to help every West Ohio church, ministry, and organization possess the financial resources they need to achieve their kingdom-building goals. Learn more at [www.umfwestohio.org](http://www.umfwestohio.org).



# TOTAL GIVING IN 2025 BY, TO AND THROUGH THE FOUNDATION: \$5.1M

## Connectional Giving to WOC and The UMC

The Foundation facilitated over **\$233k** in gifts from donors to West Ohio and other UMC ministries and missions like:



- ◆ All in Community
- ◆ Wesley Camp and Retreat Center
- ◆ UMCOR
- ◆ Wings of the Morning



Wings of the Morning

## UMFWO Sponsorships and Grants



The Foundation gave **\$10k** in sponsorships to West Ohio and other UMC events like the 140th Celebration of Korean Methodism and the Go Awards.

The Foundation made **47** grants totaling **\$133k**.



Presenting the award to York Street UMC for the Breakout Vision at the 2025 Go Grants

## Gifts to the Local Church



The Foundation facilitated **\$621k** in gifts from donors to the local church, including **28** gifts of stock totaling nearly **\$548k**.



Stock gift beneficiary Powell UMC

## New Assets

Three new endowment funds were created at UMFWO with **\$1.44M** in local church assets and donor gifts. New endowment holders include Faith Community UMC and Hilliard UMC. Trinity UMC (Columbus) will benefit from the newly established Warmbrod Endowment thanks to the generosity of Catharine Warmbrod through her estate.



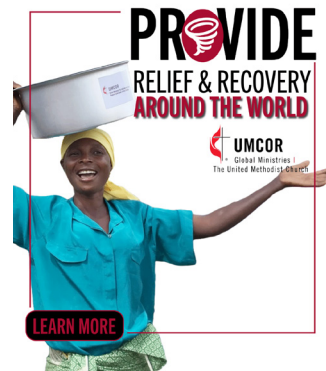
Churches with endowments at UMFWO contributed an additional **\$2.6M** to their accounts.

## Total Payments Made to Annuitants and CGA Beneficiaries in 2025



The Foundation paid over **\$53k** to people who benefit from charitable gift annuities.

**\$48,305** in beneficiary designations were made to Faith Community UMC in Xenia and UMCOR thanks to the generosity of Ann W. Ledbetter and Hertha Vice, upon their passing this year.



If you would like to learn more about giving, please contact the Foundation at [sblack@wocumc.org](mailto:sblack@wocumc.org) or 380-223-9257 or learn more at [www.umfwestohio.org](http://www.umfwestohio.org).

# ENDOWMENT LIST

## CHURCHES, ORGANIZATIONS AND DISTRICTS WITH ENDOWMENTS AT UMFWO

Bradner UMC

Charitable Pharmacy of Central Ohio

Christ UMC – Columbus

Christ UMC – Napoleon

Church of Saint Andrew

Church of the Redeemer

Church of the Saviour

Clarks Chapel UMC

Clough UMC

Community UMC – Circleville

Crossroad UMC

Epworth UMC – Columbus

Fairborn UMC

Faith Community UMC – West Chester

First UMC – Franklin

First UMC – Perrysburg

First UMC – Springboro

First (Grace) UMC – Zanesville

Gaines UMC

Green Camp UMC

Harlem Road UMC

Hilliard UMC

Hocking River District

Hope UMC – Whitehouse

Indian Run UMC

Johnstown UMC

Lewis Center UMC

Linworth UMC

Maple Grove UMC

Maple Street UMC

Maumee River District

Mechanicsburg UMC

New Albany UMC

New Bloomington UMC

New Life Community Outreach

The New Path, Inc.

Pandora UMC

Parkview UMC

Pataskala UMC

Paulding UMC

Pennsville UMC

Olentangy River District FBO Open Church

Powell UMC

Powell UMC Preschool

Scioto Ridge UMC

Scioto River District

St. Mark's UMC – Belpre

St. Paul UMC – Toledo

St. Paul UMC – Dayton

St. Paul UMC – Payne

The Plains UMC

The University Church

Stonybrook UMC

Trinity UMC – Ottawa

United Methodist Rural Advocates – Ignite

Waynesville UMC

Wesley Foundation – UC

Western Lakes District

William Street UMC – Delaware

*We are extremely grateful for the support of the WOC Board of Trustees and Board of Pension Trustees for their faithful investment in the Foundation.*

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## UNRESTRICTED GIFTS TO THE FOUNDATION OR WEST OHIO CONFERENCE

Mr. Chad Stoltz  
Ms. Ketha R. Robbins  
Mr. and Mrs. David and Patricia Pennington  
Dr. and Mrs. Richard T. Hoback  
Mr. and Mrs. John and Barbara Fillion  
Mrs. Joann Preston  
Mr. Michael Erchenbrecher  
Mr. Eric Rice  
Mr. and Mrs. James and Anna Heyser  
Mrs. Karen Perry-Smith  
Rev. and Mrs. Michael and Diane Pratt

Mr. William H. Brownson  
Rev. Mary L. Kay  
Mrs. Shannon Spencer  
Mr. and Mrs. Michael Stone  
Mr. Everett Gallagher  
Rev. Angie Cox  
Revs. Soren Hessler and Jennifer Quigley  
Rev. Laura Cean Wilson  
Rev. and Mr. Amy and Kenneth Haines

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## GIFTS IN HONOR/MEMORY

Mr. John DeMumbrum in honor of Rev. Kathy Currier

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## JOHN WESLEY LEGACY GIVING SOCIETY MEMBERS

Mr. David Adams  
Mr. Ronald B. Alford  
Rev. Marcus and Mrs. Kristen Atha  
Mr. and Mrs. Roy and Esther Baldrige  
Mrs. Kathleen B. Bauer  
Mr. and Mrs. Thomas and Sandra Burcham  
Mr. and Mrs. Terry and Sharon Burg  
Mrs. Barbara Cantlin  
Mr. James S. and Amy L. Chapman  
Mr. James M. Coldwell  
Rev. George D. Cooper  
Miss Bettie Eastwood  
Rev. John W. Edgar  
Rev. Dr. Stacy and Rev. Cheryl Evans  
Mr. and Mrs. John and Barbara Fillion  
Rev. Lois B. Fortson  
Mrs. Margery Freshley  
Rev. Mearle L. Griffith  
Mrs. Patricia C. Haupt  
Mr. and Mrs. William J. Hodder  
Mr. and Mrs. Thomas and Sandra Hofmann  
Mr. and Mrs. George and Eileen Howard  
Mr. Richard P. LeGrand

Mr. Roger A. Lehmer  
Mrs. Anna M. McWilliam  
Rev. Linda and Mr. John Middelberg  
Mr. and Mrs. Joseph and Joyce Miller  
Mr. Philip R. Moots  
Mrs. Betty A. O'Brien  
Mr. Eric Rice  
Mr. and Mrs. Ralph and Jane Roach  
Ms. Ketha R. Robbins  
Mr. Kenneth P. Scheffel  
Mrs. Virginia Shreves  
Mrs. Vesta Smith  
Mr. Michael E. Snyder  
Mr. Jack L. Speakman  
Mrs. Gail R. Stewart  
Rev. Stan and Mrs. Jeri Sutton  
Rev. Robert C. Tannehill  
Mr. William S. Tulloss  
Mrs. Jo Ann Ward  
Rev. Mark and Mrs. Debbi Weatherman  
Mrs. Wanda Wymer  
Mr. and Mrs. Marlen and Carol Yost