



WWW.FUMF.ORG | FOUNDATION@FUMF.ORG

866-363-9673



@FloridaUMF

Oct 2023



*Helping people
and ministries put
faithful stewardship into action*



HOW WE SERVE YOU

CORE MINISTRIES:

Loans, development, investment management, planned giving/endorowment programs, stewardship development, financial education.

DEVELOPMENT FUND:

The foundation makes first mortgage loans to churches and agencies through the Development Fund, which offers below-market interest rates on loans and attractive interest rates to investors. Any Florida resident, church or business may invest. Rates are set quarterly by directors. Visit www.fumf.org for current rates.

TYPES OF LOANS:

New church construction, expansion, loan refinancing, maintenance, repair.

CHURCH ENDOWMENTS:

The foundation works with churches to set up and facilitate planned giving and permanent endowment programs.

TRUSTEE AND CUSTODIAL SERVICES:

The foundation is empowered to act as a managing trustee of a charitable trust that benefits a church or other qualified charity.

DONOR CONSULTATION:

Foundation staff members are available to meet privately with potential donors to help them clarify their charitable giving goals.

INVESTMENT MANAGEMENT:

The foundation manages church and agency funds in accordance with investment fund agreements, deposit or custodial arrangements, endowment arrangements, donor advised gift agreements, and charitable gift annuities or under the terms of a will, trust or gift arrangement. The funds are placed under professional management, and a small fee is assessed in order to cover administrative costs.

INVESTMENT FUNDS:

The foundation offers socially driven, broadly diversified funds that meet the investment needs of Florida Conference churches, agencies and related ministries.

OVERSIGHT:

The board of directors provides oversight, and the investment committee meets quarterly with an independent performance review manager to evaluate fund performance. The foundation provides an accounting of transactions for each account invested in its common funds.

STEWARDSHIP DEVELOPMENT:

Through its educational programs and core ministries the foundation fosters an understanding of stewardship as an act of worship and discipleship. It strives to help individuals and churches develop a theology of stewardship through workshops and individual consultation.

OTHER OUTREACH MINISTRIES:

The foundation offers personal and church financial workshops and a pre-retirement planning workshop for clergy. It also partners with conference agencies to provide financial planning services to candidates for ministry.

