

ENDOWMENT FUNDS

ANNUAL REPORT
2022



...gathered here for good.™

The Oxford English Language Dictionary defines the phrase “for good” with two words: “forever; definitively.” Endowment Funds are for good. They support mission and ministry, today, tomorrow, and beyond. They are permanent funds, carefully invested, that produce income to meet mission and ministry needs that might otherwise go unmet.

At the very beginning, in Genesis, we are told that when God saw all that God had made, including you, including me, it was good, very good. In God’s image, we have been created good, for good, forever. Thanks be to God for the opportunity to support God’s work. Forever. Definitively. Thanks be to God for the commitment of Legacy Society members.

Visit our planned giving website at firstlegacy.org

TABLE OF CONTENTS

MESSAGE FROM THE CHAIR & PASTOR	04
2022 UPDATE	06
ACTIVE NAMED FUNDS	08
GRANTS PROVIDED	09
BY THE NUMBERS	10
ENDOWMENT DINNER	11
LEGACY SOCIETY	12
DONOR PROFILE	13
MESSAGE FROM PASTOR ELBERT	14



THANKS BE TO GOD

“Those who hope in the LORD
will renew their strength.
They will soar on wings like eagles;
they will run and not grow weary,
they will walk and not be faint.”
Isaiah 40:31



PAUL KELLER
*ENDOWMENT BOARD,
CHAIRPERSON*

Spoken to a people in Exile, these words from the prophet Isaiah remind us that God’s love never ends. Times of exile, illness, pandemics, wars... they do not have the last word. Our God is a God of restoration and renewal, of hope and eternal love.

Two hundred years ago, a small group of Christ followers started what is today Birmingham First. In times of war and peace, through pandemics and in times of health and prosperity, through it all, Birmingham First has shared Christ, making God’s love real in our communities and around the world. Thanks be to God!



SHAWN LEWIS-LAKIN
*ASSOCIATE PASTOR,
PLANNED GIVING*

Twenty-five years ago, our Endowment Fund was established. In 2021, revenue from Endowed Funds provided nearly \$240,000 in support for ministry and mission. Through General Endowment grants and for purposes defined in named funds, over \$270,000 is available in 2022. Because of the foresight and generosity of those whose legacies we are recipients, God’s love is real in our lives and in the lives of others. Thanks be to God!



Please be sure you have Friday, May 6, 2022, marked on your calendar. Dr. Lalleen Rector will be with us for our Endowment Dinner. Our theme for the evening is “Together Again: New Ways of Being Community.” Dr. Rector, the first woman and first lay person to be president of Garrett Evangelical Seminary, will bring a message that acknowledges all that we have been through over the past two years and invites us to reinvigorate our common purpose as followers of Christ (see page 11). The Endowment Dinner is a ministry of our Endowment Board. There is no fee to attend. And you are invited!

We are living in times of great challenge. And yet, our hope in God endures. Your commitment to legacy giving is an affirmation of faith and a witness to generations yet to come.

PAUL KELLER

*ENDOWMENT BOARD,
CHAIRPERSON*

SHAWN LEWIS-LAKIN

*ASSOCIATE PASTOR,
PLANNED GIVING*



“We (and yes, the world) have experienced a difficult time over the last two years. I am excited to join you at the May 6 Endowment Dinner. Let’s explore what it means to be coming back together given what we have been through, personally, within our families, communally, and nationally/ globally.”

DR. LALLEEN J. RECTOR

*PRESIDENT EMERITA,
ASSOCIATE PROFESSOR OF
PSYCHOLOGY OF RELIGION AND
PASTORAL PSYCHOTHERAPY,
GARRETT-EVANGELICAL THEOLOGICAL
SEMINARY*

ENDOWMENT BOARD

2022 UPDATE

The Endowment Board oversees the General Endowment and Named Endowed Funds. Combined, these funds produce approximately \$250,000 in annual revenue to support ministry and mission. We celebrate the faithfulness of those whose generosity makes possible the tremendous positive impact these funds make.

General Endowment

The purpose of the General Endowment Fund is stated in church conference resolutions originally adopted December 11, 1995, and updated July 23, 2018. The purpose of the General Endowment is “to generate a fund or funds for use by this congregation to meet ministry and mission needs not included in the operating budget,” and “to provide a continuous educational program to encourage and inform our membership of the opportunities for endowment giving through donations, bequests, memorial and gifts.”

In 2021, our General Endowment generated \$147,635 for uses aligned with this purpose. This was combined with \$13,191 in carryover from 2020 to make a total of \$160,826 available for funding programs and projects supplemental to those supported by the congregation’s ministry plan (operating) budget.

The Endowment Board receives and considers grant requests from various ministry areas. In 2021, two major general endowment grants were awarded: a \$50,000 grant for the

purchase of a new church van (which is on order), and \$62,000 to support the work of our 200th anniversary committee. Additional funding was provided for hybrid meeting technology (including OWL cameras, laptops, and monitors), podcast equipment, and bunk bed construction at an orphanage in Haiti (in honor of Carl Price). A total of \$148,598 was expended or committed. \$18,820 in funding was carried over to 2022 (some of this was from grant funds awarded and not expended or obligated).

In 2022, the Endowment Board started the year with \$182,313 available to support ministry and mission (\$163,493 in “new” funds and \$18,820 in carryover). Meeting in February, the Endowment Board approved two grant requests for 2022: 1) to support the IXOYC (High School) Choir England Trip in Summer 2022 and 2) to support Desert Sisters Retreats in 2022 and 2023. The Endowment Board meets five times per year and looks forward to funding additional requests as the year progresses. For information on Endowment Board meeting dates and guidance on how to prepare a grant request, contact Pastor Shawn.

Named Endowed Funds

In addition to our General Endowment, we are fortunate to have thirteen active named endowed funds (and two additional named funds that have been established but are not yet active). These named funds were established

with significant gifts to support designated purposes. Their uses are restricted to the purposes articulated in the agreements establishing the funds.

At the beginning of each calendar year, the appropriate committee chairpersons and staff members responsible for ministry areas able to use revenue from named funds are notified of the funding available to them for the year. This funding is available to support any programs or projects that fall within the purpose of the fund. In 2021, named funds generated \$79,006 for ministry and mission; \$90,318 is available in 2022 from named funds. Committee chairpersons and staff members with oversight of ministry areas able to use these funds have been notified of their availability and are now making plans to put them to work, making God's love real.

Thanks Be to God!

Thanks be to God for all those whose generosity and faithfulness make possible our Endowment ministry!

For assistance with current or planned gifts, visit our website, firstlegacy.org, or contact Pastor Shawn Lewis-Lakin at slewis-lakin@fumcbirmingham.org or 734-717-8947.

“Thanks be to God for all those whose generosity and faithfulness make possible our Endowment ministry!”



SHAWN LEWIS-LAKIN

ASSOCIATE PASTOR, PLANNED GIVING



ACTIVE NAMED FUNDS

In addition to our General Endowment, our Endowment Board oversees named funds. These funds are established with specific purposes. Expenditures from these funds are restricted to programs and projects that align with each fund's purpose. In 2021, named funds generated \$79,006 for ministry and mission; \$90,318 is available in 2022 from named funds. If you have a passion for an area of ministry supported by a named fund, please consider a directed contribution to the fund. For more information, contact Pastor Shawn.

Fund Name	Purpose
The Seminary Intern Fund	Support interns at Birmingham and Berkley First preparing for parish church ministry.
The Jessie and George Nyhus Memorial Fund	Encourage and provide the means whereby the staff become better servants of Jesus Christ and leaders.
The Wesley Ministry Fund	Lay and clergy continuing education.
The Littleton Seminary Scholarship Fund	Assist in the training of candidates for ordained ministry in the UMC by providing scholarship assistance for Birmingham and Berkley First seminary students.
The William J. Kernan, Jr. Fund	Assist Partners in Missions (PIM) activities.
The Robert and Clara Hermann Fund	Assist Partners in Missions (PIM) activities.
The Catherine Drinkard Fund	Missionally related programs directed toward children and youth who are economically and culturally impoverished.
The Christopher Hall Fund for Worship, Music and the Arts	For programming and new initiatives which will enhance worship, music, and fine arts ministry, with a focus on encouraging persons to consider a call to the ministry in church music.
The A.M. Music Fund	Projects related to the music ministry.
Concert Fund	To provide subsidies for special musical concerts.
The Claude and Caroline Stevens Youth Fund	Monies for youth projects - any project that will benefit the youth of the church, middle school through college age.
The Steven Wells Fund	Support discipleship ministries (Christian Education) for children and youth.



GENERAL ENDOWMENT FUND

GRANTS PROVIDED

LAST 5 YEARS

- Outreach/Advertising Support
- Horizons Stewardship
- CLC Projector and Screen
- FORWARD Initiatives
- Financial Peace Curriculum
- Youth Choir Trips to England
- Welcome Center Staffing
- Arena Software Upgrade
- Berkley First Support
- Endowment Dinners
- COR-Leadership Institute
- Fall Welcome Event
- Poverty Simulation Kit
- Men's Retreat (multiple years)
- Women's Retreat (multiple years)
- Planned Giving Software and Webpage
- Discipleship Ministries Support
- Young Adult and Youth Ministries Support
- Livestreaming Equipment Upgrades
- Online Course: Giving Thanks in Difficult Times
- Workshop with Diana Butler Bass
- Hybrid Meeting Technology Hardware
- Saving Grace Course Materials
- Podcast Production Equipment
- Haiti Orphanage Support
- Technology Upgrades (tablets and laptop purchases)
- Strategic Planning Work
- 200th Anniversary Committee
- New Passenger Van (on order!)

BY THE NUMBERS

GENERAL ENDOWMENT FUND AT 1/1/21 \$4,414,059

Receipts (Bequests, Contributions, Memorials, Transfers from Gift Annuities)	483,510
Interest, Dividends, and Market Appreciation (adjusted quarterly)	508,376
Grants, Grant Commitments, and Fund Expenditures	(165,878)

GENERAL ENDOWMENT FUND AT 12/31/21 \$5,240,067

GIFT ANNUITIES AT 1/1/21 \$934,573

Interest, Dividends, and Market Appreciation (adjusted quarterly) Expenditures	80,632
Annuity Payments & Transfers to General Endowment	(373,472)

GIFT ANNUITIES AT 12/31/21 \$641,733

Endowment Board

Paul Keller, Chair
 Shawn Lewis-Lakin, Staff Liaison
 Joan Benner
 Doug Carvell
 Eric Freeburg
 Mike Fritz
 Tove Jackson
 Gayle McGarvah
 Claude Oleson
 Dick Schoelch
 John Stevens
 Gary Valade, Emeritus
 Jim Valiquett

Investment Committee

Dick Laimbeer, Chair
 Susie Hierholzer, Staff Liaison
 Brett Bernard
 Jeff Grabiell
 Rob Grabiell
 Kevin Heckman
 Mark Lachowicz
 Colin Lennox
 Rick Nauer
 Andy Schueler
 Frank Schweibold

2022 ANNUAL

ENDOWMENT DINNER



TOGETHER AGAIN

New Ways of Being Community

Friday, May 6, 2022
Birmingham First
Fellowship Hall



The Annual Endowment Dinner is a ministry of the Endowment Board of our church, providing a complimentary dinner and a speaker with a message that will appeal to, and have meaning to, our congregation and friends. This year we could not be more pleased to announce as our speaker Dr. Lallene Rector, President Emerita, Associate Professor of Psychology or Religion and Pastoral Psychotherapy, Garrett-Evangelical Theological Seminary.

In her sharing with us, Dr. Rector will address

the challenges we face during difficult times. Acknowledging the strain of the last two years, her message is one of hope. She will use a biblical perspective about where we've been, where we are now and how we can move forward together, both within our families and within our congregation.

Reservations are required to attend the Endowment Dinner. You can register for this free event through our website, fumcbirmingham.org, or by contacting Janet Smylie at 248-626-1200, ext. 3121.

"I'm very excited to be visiting Birmingham First! The last two years have been traumatic for many of us, in different ways and at different levels. We are not quite the same people we were before - and we are not even quite the same congregations. I think we sense there is work to do together to reinvigorate our common purpose as followers of Christ. The mantle of our faith is carried by church members everywhere - WE are the continuity of the church. May our time together in May spark renewed energy for the race set before us!"

Dr. Lallene J. Rector

MEMBERS

LEGACY SOCIETY

Legacy Society members have a current planned gift with the Endowment or have indicated they have planned a gift in their estate.

Anonymous (3)
Shedrick & Ryan Abney
Dr. Ralph* & Nancy*
Bauer
Barb Baughman
Dwight* & Joan Benner
Craig & Debbie Berg
Lon Bone
Linda Buchanan
Jim & Katie Davis
Roy & Teena Dickerson
Tim & Laura Dickerson
Frank & Carol Driscoll
Fran & Janette Engelhardt
Aileen Erdmann*
Janice Erichsen
Brady & Tiffany Ericson
Lynn & Jan Evans
Bob Everson
Bob & Mary Feldmaier
Brent & Amy Fitch
Margaret Fitts
Don & Sue Foehr
Eric & Diana Freeburg
Michael & Jeanne Fritz
Lois Gaigalas*
Bob Gillow
Bill & Barbara Goode
Fred & Judy Green
Chris & Doris Hall
Rev. Gary & Bishop
Laurie Haller

Rev. Dr. John E. & Judy
Harnish
Tom Henderson* &
Susan Waun
Esther Heussner*
Clare* & Kay Higby
Jeff & Mixie Hockman
Russ & Sue Ives
Sam & Tove Jackson
Fran Jones
Jenny & Peter Kanefsky
Paul & Jackie Keller
Connie & Joe Kenty
Jerry* & Greg LaBrake
Eric & Candace Law
Shawn & Barbara* Lewis-
Lakin
Ann Littleton
Greg & Wendy MacKenzie
Charlotte Mahrt
Mick & Sarah McClelland
Pauline McClew*
Gayle McGarvah
Robert & Sukie* McNutt
Gwen Moore
Howard R. "Skip"
Neilson*
John & Sharon Newman
George* & Mary Ann
Newton
Susan & Claude Oleson

Bill* & Jane Pettibone
Jan Query*
Duane & Deanna Ralston
Doug Reinhard
Roy Reiterman*
James & Carol Rillema
Rev. Dr. William & Kris
Ritter
Richard & Lin Schoelch
Toni Segitz
Richard & Sara Shirley
Shane & Anna Spradlin
Joyce Stanton*
John & Liz Stevens
Bob & Ellie Sutherland
Chuck & Margy Truza
Gary & Margaret Valade
Jim & Merry Beth
Valiquett
Tom & Rose-Marie Venier
Ron & Gerri Vander
Molen
Peggy A. Walker
Sue Walters
Steven* & Lisa Wells
Dorothy Willison*
Zeno & Ann Windley
George & Julie Work
Gwen & Brad
Zimmerman

*Indicates Legacy Society Members who have passed on to Glory.
Thanks be to God for their life and faith!

If you have already included Birmingham First in your estate plans or would like further information about planned giving, please contact the Rev. Shawn Lewis-Lakin, Associate Pastor for Planned Giving, at 734-717-8947 or slewis-lakin@fumcbirmingham.org.

DONOR PROFILE

JOAN AND DWIGHT BENNER

Joan and Dwight Benner met when Dwight helped Joan unload her car when she arrived at Garrett Evangelical Theological Seminary (GETS), where Dwight would earn his Master of Divinity Degree (and later a Doctor of Ministry Degree) and Joan would earn a Master of Arts Degree in Christian Education in a cooperative program with Northwestern University. Dwight served as a pastor in United Methodist churches for 14 years and then earned a degree in computer information systems. It was Dwight's career change that brought Joan and Dwight to the Detroit area, where they joined our congregation in 1983.

Joan grew up in a small church in northern Michigan. After she graduated from college, Joan taught in the Grand Rapids area and joined Grand Rapids First United Methodist Church. When she went to GETS, Joan received funding support from an endowed fund at Grand Rapids First UMC. She knows firsthand how legacy giving can positively impact generations yet to come.

Joan worked at Birmingham First for twenty-six years, beginning as the computer coordinator and then working as the financial administrator. When asked what about her work was most fulfilling, Joan's response was, "Seeing the faithfulness of our people." She continued, "The commitment our members have to faithfully support the work of God through the church is tremendous. It was not necessarily the size of the gifts, but the commitment behind each gift, and the consistency with which people offered their support."

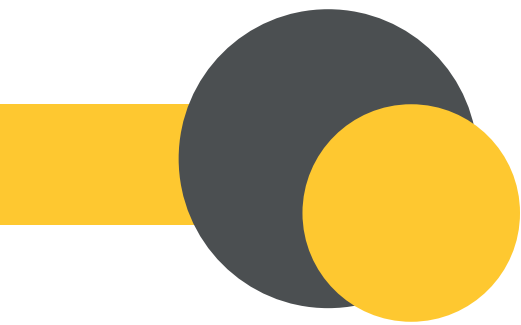
In September 2015, Dwight Benner was killed tragically while he and Joan were



traveling in the state of Washington. In the aftermath of this unimaginable tragedy, Joan was cared for by a host of people, including the local United Methodist church pastor in Washington. As Joan said, "I was cared for, loved, welcomed, and supported in ways that I could not have imagined. I really experienced church – this church and the wider church – when I needed it most."

In Dwight and Joan's estate plan, they committed 5% to Birmingham First and 5% to Garrett Evangelical Seminary. It's a commitment that Joan has affirmed in the aftermath of Dwight's death. Their commitment is a statement of faith in God and God's work through Birmingham First. Joan's hope for our church is that we will continue to change to meet the challenges of each new day. She is confident that "the church will be faithful to be at work in the world, where all people can participate, and we meet the needs of those who look to us."

Thanks be to God for Dwight and Joan and their faithfulness, yesterday, today, tomorrow, and into the future.



WE ARE CALLED!

“And we know that in all things God works for the good of those who love him, who have been called according to his purpose.”

Romans 8:28

The Church is the community of faithful that have been called in Jesus Christ; called to God’s very side as we seek to live at the side of those who need us most; that they might know they are not alone.

But imagine for a moment what would happen if we chose not to answer our call. What would happen for Afghan refugees if we chose not to answer the call to stand at their side in this time of great need? What would happen for the guests of Cass Community Social Services if we chose not to answer the call when they needed us most? What would happen if we just simply went back home each week without listening for the call that God places on each of our lives to respond to make God’s love real in the lives of others?

201 years ago, the people of Birmingham First didn’t know what it would mean to answer the call to bring Jesus to Piety Hill in a bar known as Willet’s Tavern, but they responded, nonetheless. And here we are today. They didn’t know that we’d grow to over 3000 people or that in spite of a pandemic, we’d still be 2700 members strong.

They certainly didn’t know that we’d be building churches in places like Costa Rica and Haiti. They didn’t know that we’d provide clean drinking water in Africa and Sneedville, Tennessee. They didn’t know that our youth choirs would travel back to England, the place of our Methodist heritage, and bring the gospel in music. I’m pretty sure that they never would have imagined having two campuses.

And yet, they answered the call to be here in this place; to give their all, come what may, for the people of their community and their world in their day so that somehow, by the grace of God, someone might be here to do the same today.

I’m not so sure that John and Nancy Smith knew entirely what might happen when they first reached out to bring mission teams to Haiti. They simply offered themselves, along with some others, believing that God had called us together, united as one, to make a difference following a devastating natural disaster. These past two years, when we couldn’t get on the ground, we sent supplies and resources.

“How will we answer
God’s call for the
sake of the world?”



ELBERT DULWORTH

SENIOR PASTOR

Even better yet, one young man, who’s like a Haitian son to John and Nancy, gathered a group of friends to clean up the streets of his town. The Catholic bishop saw what they wanted to do and offered some supplies. That’s what happens when God’s people answer the call. Others join in the response and lives are transformed, communities are forever changed, and the world is never the same because of God’s grace at work among us.

The question is not whether God calls us today, but “How will we answer God’s call for the sake of the world?” As we answer God’s call, God uses us and what we offer in God’s name to positively impact our community and communities around the world, now and for generations yet to come.

Adapted from sermon preached in our Birmingham sanctuary on Sunday, February 13, 2022.



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