

SIGNS OF HOPE



ENDOWMENT FUNDS

**ANNUAL REPORT
2023**



**BIRMINGHAM FIRST
BERKLEY FIRST**
A UNITED METHODIST CHURCH

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FILLED WITH HOPE

May the God of hope fill you with all joy and peace in believing, so that by the power of the Holy Spirit you may abound in hope.

Romans 15:13

People are hungry for connection, relationships, and purpose. Multiple research studies have demonstrated a positive correlation between strong social relationships and health. A recognized predictor of longevity is the strength of one's social connections.

And local churches, congregations like ours, provide connection, relationships, and purpose. The communities of Birmingham First and Berkley First welcome and include those for whom love is a stranger. We help people find their stories in God's story and discover purpose and meaning for life.

What this process looks like. How we gather. Where we gather. This changes in each new generation. What does not change is our commitment to being present with each other and our communities. What does not change is God's love that continuously seeks to embrace, welcome, and restore.

I am thankful for those of past generations whose legacy gifts support ministry and mission in our day. I am thankful for those whose estate plans include legacy gifts that will support ministry and mission for generations to come. The need for what God does through local churches is great. Thanks be to God for the resources that allow us to meet that need. Thanks be to God for the resources that will allow generations to come to meet the need.

I believe in the ministry of local churches. And I am filled with hope for Birmingham and Berkely First.

Thanks be to God,

Pastor Shawn



A REFLECTION BY THE SENIOR PASTOR



**REV. DR. CHARLES S. G.
BOAYUE, JR.**

SENIOR PASTOR

“Lift high the cross, the
love of Christ proclaim,
till all the world adore
His sacred name.”

In Isaiah 40, the prophet is comforting God’s people, Israel, at a difficult time. And in verses 28 to 31, the prophet offers these words of comfort: *“Do you not know? Have you not heard? The LORD is the everlasting God, the Creator of the ends of the earth. He will not grow tired or weary, and his understanding no one can fathom. He gives strength to the weary and increases the power of the weak. Even youths grow tired and weary, and young men stumble and fall; but 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.”*

Although some will say the Church faces an uphill struggle to find its stride in our modern world, and others may argue that the Church is irrelevant to the world today, I still believe that God is not finished with the Church yet.

Throughout history the Church has faced difficulties in its self-understanding, with its mission, and with its relevance to the struggles of the world. This time is not different, although changes are coming in new ways and quicker than ever before. Despite advances in science and technology, discoveries of new forms of life in the farthest reaches of the galaxies and the possibility that there may be life in still other parts of the universe, and the emergence of new powerful nations like China, Russia, and India which are changing the balance of power and influence in the world, some basic truths have not changed. The truth that, no matter how much the world changes, people still need God in

their lives because the world is not our home. Even after all our advances in science, technology, industry, culture, human civilization, and international relations, we still stand in need of finding our way to our ultimate destiny – heaven.

Hence, the Prophet Isaiah's words of comfort should encourage us neither to grow weary nor faint. Instead, in the worlds of the hymn, "Lift High the Cross," let us remain vigilant and do all we can to "lift high the cross, the love of Christ proclaim, till all the world adore His sacred name." In so doing, we will keep an ever-changing world aware of the basic truth that this world is not our home. Isaiah's insight will assist our world to put into proper perspective that the whole creation ultimately must find its rest and its peace in God. Our Endowment Fund is a significant sign of hope as people invest in the healing of our broken world through ministries of compassion, hope, and reconciliation. Our ministries and witness to this eternal truth are a sign of hope for the world. Let us keep the torch of hope burning. Let us shine our light before others so that they will see our good works and glorify our God in heaven.

Endowment Board

Paul Keller, Chair
Shawn Lewis-Lakin, Staff Liaison
Joan Benner
John Carter
Doug Carvell
Jeff Cort
Luc Feilla
Eric Freeburg
Gayle McGarvah
Claude Oleson
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Rob Grabiell, Chair
Frank Turco, Staff Liaison
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Jimmy Banyai
Brett Bernard
Kevin Heckman
Mark Lachowicz
Colin Lennox
Rick Nauer
Andy Schueler
Frank Schweibold

A MESSAGE FROM THE CHAIR



PAUL KELLER

ENDOWMENT BOARD,
CHAIRPERSON

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

To many of us, spring is a season of hope.....hope that things will get better than they were before. A visual image of spring was provided by Ernest Hemingway in “A Moveable Feast” when he wrote that the river will “flow again after it was frozen”. As humans, we are called in spring back to nature, to walk, to hike, to garden, to clean, to prepare the patio or deck for a second home under the open sky. These are signs of hope for life to get back to normal. This hope is ever so poignant as we believe we are seeing Covid-19 grow ever smaller and smaller in the rear view mirror.

Another sign of hope we all witnessed in February this year was the Asbury Revival where the Spirit moved countless college students and others to worship in an auditorium in Wilmore, Kentucky, bringing forth life and inspiring hope. By its end, the revival brought 50,000-70,000 visitors to the town and university, representing more than 200 academic institutions and multiple countries. Flowing over like a river, that same revival movement spread from Asbury to other colleges and universities across the United States.

The Bible recites numerous passages dealing with hope, one being First Timothy 4:10:

That is why we labor and strive, because we have put our hope in the living God who is the Savior of all people, and especially of those who believe.

The Endowment Board is thankful for those members of Birmingham and Berkley First who labored and strove to leave a legacy for generations who would come after them. Those members and many others who followed put their hope in the living God and, in doing so, added over the years their measure to the church's endowed funds that began in 1995. In 2022, proceeds from those funds, including the General Endowment and fourteen Named Funds, provided nearly \$255,000 in new funding for supporting ministries and missions and initiatives of the church. For 2023, new funding of approximately \$270,000 has been made available. Thanks be to God!

Besides the regular work of the Endowment Board in 2023, we have cooperated with the Finance Committee and the Board of Trustees to investigate moving day-to-day management of the Endowment Fund Portfolio, Named Funds Portfolio, and Gift Annuities Portfolio (as well as the Home Fires Portfolio and the Operating Fund Reserves) to an independent financial management team. We believe that professional management of those monies will better serve the church in stewardship of those assets for their particular purposes.

We hope you find the pages of this Annual Report useful to understand the breadth of legacy support that endowed funds provide to Birmingham and Berkley First. Details are provided

about many of the grants that have been awarded and growth of the portfolios over the years. Although 2022 was not kind to invested funds across the board for individuals and organizations like Birmingham and Berkley First, and many portfolios ended the year in negative territory, we live in hope that the balances will rebound with the market to where they were before and continue to grow from there.

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

ENDOWMENT BOARD

2023 UPDATE



SHAWN LEWIS-LAKIN

ASSOCIATE PASTOR,
PLANNED GIVING

“May the God of hope
fill you with all joy and
peace in believing, so
that you may abound
in hope by the power
of the Holy Spirit.”

Romans 15:13

The Endowment Board oversees the General Endowment, Named Endowed Funds, and Charitable Gift Annuities. 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 2022, our General Endowment generated \$163,493 for uses aligned with this purpose. This was combined with \$67,820 in carryover from 2021 to make a total of \$231,313 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 2022, major general endowment grants supported the purchase of a new church van, provided scholarships to youth for their trip to

England, provided start-up support for our new online Tapestry campus, and provided start-up funds for the reopening of our Christian Life Center. Additional funding was provided to support reconfigured staff positions and training (in the areas of finance, operations, and in-reach). Support was also provided for the Desert Sisters retreat, and missions in Haiti and Honduras. In addition, \$83,050 of commitments were made to support programs and staff in 2023. A total of \$161,196 was expended or committed. \$70,288 in funding was carried over to 2023.

For 2023, the Endowment Board started the year with \$238,250 available to support ministry and mission (\$167,962 in “new” funds and \$70,288 in carryover). As noted above, \$83,050 of these funds were committed through the approval of multi-year grant requests, leaving \$155,200 yet to be awarded through grants. The Endowment Board meets five times per year and looks forward to funding 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 fourteen active named endowed funds (and one additional named funds that has been established but is 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 2022, named funds generated \$90,318 for ministry and mission; \$90,292 is available in 2023 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!

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.

GENERAL ENDOWMENT FUND

GRANTS PROVIDED

LAST 5 YEARS

- Outreach/Advertising Support
- Horizons Stewardship
- CLC Projector and Screen
- FORWARD Initiatives
- Financial Peace Curriculum
- Youth Choir Trip to England
- Cuba Mission Trip Support
- Endowment Dinners
- 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)
- Tapestry (online campus) support
- 200th Anniversary Committee
- New Passenger Van
- Support for Christian Life Center Reopening
- Support for staff training and salary support in the areas of finance, operations and in-reach



ACTIVE NAMED FUNDS

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.
James and Carol (Blades) Rillema Fund	Support locals missions (serving persons and communities in Michigan) prioritizing in order education, health improvement efforts, and hunger.
Preschool Scholarship Fund	To provide financial assistance to families who have a child or children attending preschool at Birmingham First.

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.

BY THE NUMBERS

GENERAL ENDOWMENT FUND AT 1/1/22 \$5,310,232

Receipts (Bequests, Contributions, Memorials, Transfers from Gift Annutities)	37,295
Interest, Dividends, and Market Appreciation (adjusted quarterly)	(986,656)
Grants, Grant Commitments, and Fund Expenditures	(178,118)

GENERAL ENDOWMENT FUND AT 12/31/22 \$4,182,753

GIFT ANNUITIES AT 1/1/22 \$640,802

Interest, Dividends, and Market Appreciation (adjusted quarterly)	(137,345)
Annuity Payments & Transfers to General Endowment	(29,467)

GIFT ANNUITIES AT 12/31/22 \$473,990

ENDOWMENT AND GIFT ANNUITIES AT 12/31/22 \$4,656,473



2023 ANNUAL ENDOWMENT DINNER

SIGNS OF HOPE



Friday, May 5, 2023
6:00 p.m.
Birmingham First



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 welcome as our speaker, The Reverend Dr. Javier A. Viera, president of Garrett-Evangelical Theological Seminary, where he also serves as Professor of Education and Leadership. Joining Garrett in January 2021, Dr. Viera has quickly led the institution through major initiatives that include a new strategic plan, curricular review, accreditation review, a year-long diversity, equity, and inclusion self-study, and

the launching of new programs which have resulted in increasing enrollment. Prior to joining Garrett-Evangelical, Dr. Viera served as the 14th Dean of the Theological School at Drew University from 2014-2020, where he also served as the university's Vice Provost and as Professor of Pastoral Theology. Dr. Viera is a graduate of Florida Southern College, Duke, Yale, and Columbia universities and hails from San Juan, Puerto Rico, the city where he was born and raised.

Dr. Viera will speak on "Abundant Signs of Hope: The Church's Future in an Age of Uncertainty." While the narrative of decline and discord is ubiquitous with regard to the church and religious practice, that narrative tells only part of the story. There are signs of Christian vitality and promise abounding all around us, we simply have to look in new and different places for where the Spirit is bringing forth new life and inspiring hope.

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

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
Doug & Jane Carvell
Jim & Katie Davis
Roy* & Teena Dickerson*
Tim & Laura Dickerson
Frank & Carol Driscoll
Geri Dunkle
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
Mary Goyeau
Fred & Judy Green

Chris and 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
Anna & Austin Kendall
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 and 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

*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

MIXIE AND JEFF HOCKMAN

Jeff and Mixie Hockman celebrate the blessings in their lives and are committed to blessing others through their prayers, presence, witness, service, and gifts. Jeff and Mixie, who had been long time members of Beverly Hills UMC, transferred their membership to Birmingham First, following their family here, as their grandchildren attended our preschool. Within a month of officially joining Birmingham First, Mixie and Jeff were serving on committees, sharing their gifts of organization and leadership.

Mixie has a passion for missions. She was a member of the Missions Committee and chaired the committee in 2011 and 2012 (while also serving as president of our local YMCA board!). She also served on and co-chaired our StreeThreads mission for eight years. Mixie was one of the founders of the Desert Sisters retreat ministry; a ministry that lasted eleven years. She has served on the Faith Formation Committee, including as the chair for three years. Most recently, she has been a member of the Seminary Relations Committee and chaired that committee in 2022.

Jeff has been active as a member of our Board of Trustees, including chairing our Trustees during the Fellowship Hall renovation project. From 2014 to 2019, he served as chair of our Endowment Board. Currently Jeff serves as our congregation's treasurer (after having been assistant treasurer for a year) and is on our Finance Committee.

Jeff and Mixie's commitment to missions and service extend beyond formal leadership roles. As a member of various mission teams, Mixie traveled internationally to Ghana and domestically



to God's Country Cooperative Parish. In 2012, Jeff and Mixie traveled together to Haiti; an experience they describe as one of the best things they have ever done together. The relationships Jeff and Mixie formed through travel with missions continued well beyond their return home as they provided funding support for the education of young people they met through their travels.

At The Ohio State University, one of Jeff's professors, a man by the name of Woody Hayes, stressed the importance of paying it forward. (Jeff has a degree from OSU and wears an annoying red sweater on certain fall football weekends.) He also has an MBA from Ohio University. Beyond leadership in our congregation, Jeff's commitment to community service includes serving as chairman of the Beaumont Foundation Board of Directors, the Board of Directors for Beaumont Health System, Chair of Oakland Housing Foundation, and Chairman of the Birmingham Shopping

CONTINUED ON PAGE 16

DONOR PROFILE

MIXIE AND JEFF HOCKMAN

CONTINUED FROM PAGE 15

District. He has served as a City Commission Member and Mayor for the City of Birmingham. And he served on the Birmingham School Board for sixteen years, including five terms as president. Jeff has received numerous awards recognizing his incredible community leadership. Jeff and Mixie are the only couple who have been named First Citizen of The Year for Birmingham/Bloomfield, Jeff in 1997 and Mixie in 2001.

Jeff and Mixie believe passionately in the work of the church, the positive impact it makes on the broader community, and the critical need for the church to be present and visible in the community moving forward. Jeff and Mixie's commitment to pay it forward as Legacy Society members is grounded in their gratitude for the church's impact on their lives. They believe the church's support and outreach in future generations will be ever more important and they are committed to leaving a portion of their estate to support the work of the church. They give thanks for their blessings, they recognize they stand on the shoulders of past generations, and they are committed to leave a legacy that offers blessing for generations to come. They would like to leave you with this quote from Winston Churchill, "We make a living by what we get. We make a life by what we give." Thanks be to God!



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fumcbirmingham.org
berkleyfirst.org
firstlegacy.org



WAYS TO GIVE

IRA ROLLOVER GIFT

If you are 70 ½ or older, you can make a gift to us from your IRA.

GIFT OF SECURITIES

Gift us stock (with a low basis) that has appreciated over a period of time and avoid capital gains tax.

LIFE INSURANCE GIFT

Eliminate an old or unneeded life insurance policy by making a gift of the cash balance to support our work or consider making our congregation the beneficiary of a policy.

LIFE INCOME GIFT

Make a gift by creating a gift annuity or charitable remainder trust and receive lifetime payments. Contact Pastor Shawn for a free illustration with your benefits.

CHARITABLE BEQUEST

Make a gift to support our work that costs you nothing today. Provide for your loved ones first and then our congregation with a bequest made in your will or trust.