



ENDOWMENT

Newsletter



BIRMINGHAM FIRST
BERKLEY FIRST
A UNITED METHODIST CHURCH

2023

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Save the Date

Endowment Dinner
Friday, April 5, 2024

Guest Speaker
Bishop Will Willimon
“What’s Next?”



Letter from the

ASSOCIATE PASTOR FOR PLANNED GIVING



IMPACT

"For where your treasure is, there your heart will be also." -Matthew 6:21



The Oxford English Dictionary defines impact as "the powerful effect that something has on somebody/something." On the pages of this newsletter, you can see and read about the positive impact of our Endowment Fund.

From support for (new staffing within our congregation) to mission activity across the world, endowment funding is having a powerful positive effect.

The positive impact of our Endowment Fund goes beyond the mission and ministry projects funded with endowment dollars. The very act of committing oneself to legacy giving by including Birmingham First in your estate plan can powerfully and positively impact you and your family.

In my own life, as I seek to be a faithful disciple of Jesus Christ, I hope to offer a witness to my family and friends. My commitment to legacy giving is a part of my witness. I believe in God. I believe in Jesus Christ. I believe in the church and the ministry we share, now and forever. I believe in the good that we do together as a congregation. And, I believe in the good that Birmingham and Berkley First will do in Christ's name for generations to come.

Putting my faith into action by including the church as a part of my legacy, impacts my life. My heart follows my treasure; my commitment to legacy giving strengthens my commitment to legacy living. I pray that this might be so for you.

In Christ,
Pastor Shawn

A handwritten signature in black ink, appearing to read "Shawn Lewis-Lakin".

The Rev. Shawn Lewis-Lakin
Associate Pastor for Planned Giving
slewis-lakin@fumcbirmingham.org
734-717-8947 (cell)
www.firstlegacy.org

Letter from the **PASTOR**



The IMPACT We Make

"So, here's what I want you to do, God helping you: Take your everyday, ordinary life—your sleeping, eating, going-to-work, and walking-around life—and place it before God as an offering. Embracing what God does for you is the best thing you can do for him. Don't become so well-adjusted to your culture that you fit into it without even thinking. Instead, fix your attention on God. You'll be changed from the inside out. Readily recognize what he wants from you, and quickly respond to it. Unlike the culture around you, always dragging you down to its level of immaturity, God brings the best out of you, develops well-formed maturity in you."

-Excerpt from The Message by Eugene Peterson, referencing Romans 12: 1-2

In writing his epistle to the church in Rome, the Apostle Paul is much aware of Roman culture, history, traditions, influence and worldview. He writes to people who live in the center of world power, influence and domination. They were quite familiar with secular life and the benefits of power. But they were also people hungering for purpose, meaning, direction, fulfillment and peace. They needed the peace this world cannot give or take away. Hence, Paul wrote to direct them to true peace and fulfillment in this life – something people in our time seek diligently.

Our 2023 Generosity Campaign theme, *IMPACT*, aligns with this concept. This campaign focuses, not merely on the money, but on those who offer themselves along with their prayers, presence, gifts, service and witness to help usher into our world the amazing grace of God to make an impact on human lives – leading them to new epiphanies of hope, faith and love. Our congregation seeks in the next year to be impactful on human lives. We will help people experience the grace, love and redemptive power of God in their own lives as they reach out to others in impactful ways. From personal devotions to congregational worship; from Bible study to mission involvement; from individual volunteering to community engagement; from secular focus to spiritual growth, *IMPACT* is a call to Christian

discipleship. From those who have been on this journey for a long time to those who are new to it, we are all called to be impacted and impactful in our world today. In 2024, our focus is on impacting people's lives and growing their faith in Jesus Christ. This theme is what those who invest in our endowment ministry are doing for the world through the love of God and the mission of Christ's Church. We invite all areas of ministry and mission across our campuses to focus on being impactful, changing the real lives of real people and making God's love real in our world today.

IMPACT is our opportunity to let God's will "be done on earth as it is in Heaven." Thanks to the Dickersons and many others whose investment in the work of God enables the Church to impact others for the salvation of the world.



The Rev. Dr. Charles S. G. Boayue, Jr.
Senior Pastor

MUSIC MINISTRY



A Celebration of the Music of Leonard Bernstein

The Chris Hall Fund, the A.M. Music Fund, and the Concert Fund all provide resources to support incredible music ministry, including special events like A Celebration of the Music of Leonard Bernstein.



A Celebration of the Music of Leonard Bernstein



ENDOWMENT BOARD

Chairperson

Paul Keller

Associate Pastor for Planned Giving

Rev. Shawn Lewis-Lakin

Chairperson Emeritus

Gary Valade

Members

- | | |
|----------------|---------------|
| Joan Benner | John Carter |
| Doug Carvell | Jeff Cort |
| Luc Feilla | Eric Freeburg |
| Gayle McGarvah | Claude Oleson |
| Holly Pisano | Jim Valiquett |
| Lisa Wells | |

INVESTMENT COMMITTEE

Committee Senior Pastor

The Rev. Dr. Charles S.G. Boayue, Jr.

Chairperson

Rob Grabiell

Staff Liaison

Frank Turco

Members

- | | |
|---------------|------------------|
| Jimmy Banyai | Brett Bernard |
| Kevin Heckman | Mark Lachowicz |
| Colin Lennox | Rick Nauer |
| Andy Schueler | Frank Schweibold |

Letter from the

ENDOWMENT CHAIR



Everyone makes an IMPACT, what is yours?

We are all familiar with how the weather impacts our lives and the lives of others around the world. It seems like every day we read or listen to reports of the negative impact that weather events are having – whether that be flooding, extreme heat, hurricanes, tornadoes, fires, famine....the list can go on and on.

Weather can also have a positive impact such as the growing of plants and flowers in springtime, an afternoon of sunshine and low humidity perfect for a picnic, or the glorious hues that accompany those special sunrises and sunsets we all long to see.

Each day during our waking hours, we too have an impact on those around us by the things we do and the words we say. Like weather, those impacts can be positive or negative. In Colosians 3:17, Paul admonishes us "...*whatever you do, whether in word or deed, do it all in the name of the Lord Jesus, giving thanks to God the Father through him*".

The Endowment Fund and Named Funds owe their existence to those who decided to leave a legacy with the blessings they had received from God. Each year, proceeds from the Endowment Fund and Named Funds are used in ways that positively impact the missions and ministries of Birmingham and Berkley First...ways that would not otherwise be possible from the Operating Budget alone.

It is our hope that each of you find ways to positively impact the lives and circumstances of others in the world by your thoughts, words and deeds. The lyrics of "Have I Done Any Good" (Mormon Book of Hymns 223) give good perspective. To that end, the below lyrics...

Have I done any good in the world today?

Have I helped anyone in need?

Have I cheered up the sad and made someone feel glad?

If not, I have failed indeed.

Has anyone's burden been lighter today

Because I was willing to share?

Have the sick and the weary been helped on their way?

When they needed my help was I there?

(Chorus)

Then wake up and do something more

Than dream of your mansion above.

Doing good is a pleasure, a joy beyond measure,

A blessing of duty and love.



Blessings,

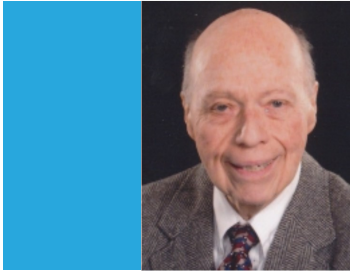
Paul Keller

Endowment Board Chair



New Fund

REINHARD FUND ESTABLISHED



Thanks be to God for the life and legacy of Doug Reinhard!

Doug was an active and faithful member of Birmingham First for over sixty-eight years. Doug is remembered as an educator and life-long learner who was deeply committed to mission ministry.

The Reinhard Fund, established through a provision in Doug's trust, will provide approximately \$12,000 per year to our Partners in Mission Fund (PIM) and impact lives locally and around the world.

Grants Provided

CHILDREN AND FAMILY MINISTRY

The Steven Wells Fund provided the salary for the Children and Family Ministry summer intern, Nicole Hierholzer.



Vacation Bible School in the CLC



Nicole Hierholzer

As of July 31, 2023

BY THE NUMBERS

2023

General Endowment Fund (01/01/2023)	\$4,215,808
Total Receipts (Bequests, contributions, memorials, transfers through 07/31/2023)	\$125,546
Interest , Dividend and Market Appreciation (adjusted quarterly)	\$369,181
Grants, Grant Commitments & Fund Expenditures	(\$108,457)
General Endowment Fund (07/31/2023)	\$4,602,078
Gift Annuities (01/01/2023)	\$441,883
Interest, Dividend and Market Appreciation (adjusted quarterly)	\$20,823
Annuity Payments	(\$13,108)
Transfer to General Endowment	(\$52,052)
Gift Annuities (07/31/2023)	\$397,546
Endowment & Gift Annuities (07/31/2023)	\$4,999,624



SEMINARY INTERN PROGRAM

Our Duke Summer Seminary Intern Program is supported with funding from The Seminary Intern and Littleton Funds. Intern Laura Auberry speaks about her recent experience as the summer intern at Birmingham and Berkley First.



It's difficult to put into words how deeply Birmingham and Berkley First shaped me this past summer. From my first Sunday doing liturgy with Rev. Shawn Lewis-Lakin, to my last Communion with Rev. Dr. Charles S. G. Boayue Jr., the summer felt like a whirlwind. Yet, I remember so many moments that shaped me and will continue to shape me as I prepare for ordination in the United Methodist Church.

Before this summer, I had never helped a wedding party or seen a wedding rehearsal. At Birmingham First, I was able to help with two weddings in one day (*a special thank you to Kate Wilcox for teaching me all the tips of a wedding coordinator*). I also was able to join the incredible work of Kim Bowyer, Amy Holton, Julie White, and the Children and Youth Ministry team through Vacation Bible School and the Youth Mission Trip. One of my most impactful learning experiences was witnessing the wonderful First Taste: Africa Celebration that occurred in July. As I chatted with congregation members, directed new visitors, and ate some incredible food, I could not help but reflect on how First Taste was

such a beautiful way in which to engage with our neighbors. First Taste was a wonderful example of how churches are called to be in community – bringing people together. As I prepare to enter ministry, I know that I will take this example with me.

I also want to emphasize how much the people of Birmingham and Berkley First impacted me and my future ministry; from the incredible ministry staff (*Dr. Boayue, Rev. Alexander, Rev. Dunlap, Rev. Hierholzer, Rev. Lewis-Lakin, and Rev. Walls*) who mentored me along with the amazing Seminary-Relations Committee, to the congregation of Birmingham and Berkley First. It was wonderful to meet you all, to hear your stories, and to see your love of God and of the church. You welcomed me into your homes, taught me about “pop” and Michigan left-turns, while treating me like family. Thank you to all who shared a bit of yourselves with me and thank you to the Endowment Fund for giving me this opportunity. I carry your stories with me as I continue in ministry.

I miss you all!

Laura Auberry
Duke Seminary Intern 2023

Christian Life Center

IMPACTING LIVES

A grant from our General Endowment was critical to reopening our Christian Life Center. A second grant is underwriting the purchase of equipment for Pickleball in the CLC.



"The CLC has impacted my life by providing a safe place to walk while recovering from back surgery. In addition, it provided a supportive environment with volunteer receptionists that encouraged myself and my friends".

- Linda Smaga



Grants Provided

CONTINUING EDUCATION

The Nyhus Continuing Education Fund supports continuing education for our clergy and staff.



"Working toward an MBA with Dakota Wesleyan University is already bearing fruit as each class has a direct correlation to the practice of ministry. It's also invaluable collaborating with a cohort of pastors from across the nation to encourage one another and share best practices. Thank you for investing in current and future leaders!" - *Rev. Zack Dunlap*

"Having the opportunity to learn and grow as a clergy person and a leader is such a gift. We are already utilizing this new knowledge and skill in our work with the church and are excited for what God will continue to do in us and through us. Thank you for the opportunity to learn and to serve and for investing in the church- for the present and for the future. - *Rev. Susie Hierholzer*

Give with an

IRA ROLLOVER

Do you own an IRA? IRA Rollover to Gift Annuity is now possible!

Would you like to give more to charity, but need more retirement income?

Now is an excellent time to consider a Charitable Gift Annuity with Birmingham First. The Secure 2.0 Act, federal legislation that was approved and signed in December 2022, provides a once-in-a-lifetime way to fund a gift annuity with a tax-free distribution from your IRA.

The maximum allowable distribution amount is \$50,000 in 2023. Under the act's provisions, you must be 70 ½ years-of-age or older to take advantage of this opportunity.

If you are interested in learning more about Charitable Gift Annuities in general or the specifics of how you can now fund a CGA with a tax free rollover from your IRA, please contact Pastor Shawn.

**Have you considered a Charitable Gift Annuity
in the past but weren't ready?**

The Dickersons

A LEGACY OF FAITH



We are both so thankful for the amazing legacies of faith from our families...very different, yet very Christ centered. Tim's grandfather was a "fire and brimstone" Nazarene preacher, while Laura's grandfather received a PhD in the History of the Catholic Church. Born and raised in the Methodist church, Tim was blessed with loving parents that we shared a pew with at Birmingham First for many years before their passing earlier this year. Birmingham First, along with Pastor Charles, were extremely gracious to our family in walking alongside us during both of their funerals and celebrations of life. While coming from different backgrounds, we shared common ground in our love for one another and our love for Christ, and

together we supported one another's faith journey.

Since joining the Birmingham church 25 years ago, God has built upon these foundations of faith and blessed us beyond anything we could have ever imagined. As new members, our "faith friends" invited us to join them in their small group. We had no idea that accepting this invitation would lead us to a small slice of heaven through the love of the Body of Christ. Our small group experience created the desire for us to learn and understand more about our faith and has been the cornerstone of a miraculous journey of Christian community. This small group of seven families provided a fun, trusting, and loving environment that truly defined the meaning of being brothers and sisters in Christ, and 25 years later, they are still some of our closest friends.

As our faith grew through fellowship, prayer, and studying God's word, our passion to serve grew as well. We started to say "yes" to God and embrace God's promises, and our desire to fulfill our promise to support the church with our prayers, presence, gifts and service became a natural and rewarding experience. As we approach retirement, giving back has become an even greater purpose in our lives. A legacy gift to the church is a natural part of our planned giving and a continuation of our personal commitment to tithing. Our hope is that our gift will help the church to thrive and continue to grow God's kingdom.

Whether our prayers are around the family dinner table or in a small group of friends, we ask God to help us be more like His Son in all that we do, and that we too will pass on this legacy of faith to our children and grandchildren. Our prayer for the church –and for you– is that you will also find and experience the "Body of Christ" as we have through this place and the people within it.

Thank you, First Church.

Tim and Laura Dickerson



Grants Provided

MISSIONS & MINISTRY

Three active Named Funds – the Drinkard, Hermann, and Kernan Funds – provide financial support for missions and ministries locally and around the world. These funds are making a positive difference in lives of persons in Detroit (Brightmoor Community), Kentucky (Henderson Settlement), Tennessee (Sneedville), Haiti, India, and Czech Republic.



Henderson Settlement Mission 2023

Grants Provided

MINISTRY EDUCATION



Pastor Myra

The Littleton Fund has provided support for Birmingham First member Myra Moreland to pursue her divinity degree and move into full time Christian ministry as the lead pastor at Troy First United Methodist Church.

Making a **BEQUEST**

Leaving Birmingham and Berkley First a bequest in a will or living trust is the most common way to create a legacy to support ministry and mission for generations to come.



Making a Bequest

There are several ways you can make a bequest to Birmingham and Berkley First:

Specific Bequest A specific bequest involves making a gift of a specific asset such as real estate, a car, other property, or a gift of a specific dollar amount. For example, you may wish to leave your home or \$10,000 to Birmingham and Berkley First.

Percentage Bequest Another kind of specific bequest involves leaving a specific percentage of your overall estate to charity. For example, you may wish to leave 10% of your estate to Birmingham and Berkley First.

Residual Bequest A residual bequest is made from the balance of an estate after the will or trust has given away each of the specific bequests. A common residual bequest involves leaving a percentage of the residue of the estate to charity. For example, you may wish to leave 30% of the residue of your estate to Birmingham and Berkley First.

Contingent Bequest A contingent bequest is made to charity only if the purpose of the primary bequest cannot be met. For example, you could leave specific property, such as a vacation home to a relative, but the bequest language could provide that if the relative is not alive at the time of your death then the vacation home will go to Birmingham and Berkley First.

Bequest Language To make a bequest you should speak with your attorney. Your attorney can help you include a bequest to Birmingham and Berkley First in your estate plan. As you work with your attorney, he may ask for the following:

The legal name for Birmingham and Berkley First, which is *The First United Methodist Church of Birmingham*.
Our congregation's Federal Tax ID number, which is 38-1393844.

Contact Us If you have any questions about how to make a bequest to Birmingham and Berkley First or to request any additional information that might be helpful to you and your attorney as you consider making a bequest to us, please contact the Rev. Shawn Lewis-Lakin, Associate Pastor for Planned Giving, by phone at 734-717-8947 or email at slewis-lakin@fumcbirmingham.org.

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 & 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 for finance, operations,
in-reach, and custodial staff)
First Taste Event
Communications Support
Lest We Forget Project
Database, Server, and Sign-in Kiosk
Upgrades



Named Funds

SUMMARY



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 training of candidates for ordained ministry in the United Methodist Church 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



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. 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 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 of church music
The A.M. Music Fund	Projects related to the music ministry
The 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 ages
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
Reinhard Fund	Assist Partners in Missions (PIM) activities

Legacy Society

MEMBERS



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

Anonymous (3)	Don & Sue Foehr	Mick & Sarah McClelland
Shedrick & Ryan Abney	Lois Gaigalas*	Pauline McClew*
Dr. Ralph* & Nancy* Bauer	Bob Gillow	Gayle McGarvah
Barb Baughman	Bill & Barbara Goode	Robert & Sukie* McNutt
Dwight* & Joan Benner	Mary Goyeau	George Miller & Faye Louise Baker
Craig & Debbie Berg	Fred & Judy Green	Gwen Moore
Lon Bone	Chris and Doris Hall	Howard R. "Skip" Neilson*
Linda Buchanan	Rev. Gary & Bishop Laurie Haller	John and Sharon Newman
Doug & Jane Carvell	Rev. Dr. John E. & Judy Harnish	George* & Mary Ann Newton
Jim & Katie Davis	Tom Henderson* & Susan Waun	Susan & Claude Oleson
Tim & Laura Dickerson	Esther Heussner*	Bill* & Jane Pettibone
Roy* & Teena* Dickerson	Clare* & Kay Higby	Dawn Pfaff
Frank & Carol Driscoll	Jeff & Mixie Hockman	Barb Pobst
Geri Dunkle	Russ & Sue Ives	Jan Query*
Zack & Rachael Dunlap	Sam & Tove Jackson	Duane & Deanna Ralston
Fran & Janette Engelhardt	Fran Jones*	Doug Reinhard*
Aileen Erdmannn*	Jenny & Peter Kanefsky	Roy Reiterman*
Janice Erichsen*	Paul & Jackie Keller	James & Carol Rillema
Brady & Tiffany Ericson	Anna & Austin Kendall	Rev. Dr. William & Kris Ritter
Lynn & Jan Evans	Connie & Joe Kenty	Richard & Lin Schoelch
Bob Everson	Jerry* & Greg LaBrake	Toni Segitz
Bob & Mary Feldmaier	Shawn & Barbara* Lewis-Lakin	Richard & Sara Shirley
Brent & Amy Fitch	Eric & Candace Law	Shane & Anna Spradlin
Margaret Fitts	Ann Littleton	Joyce Stanton*
Eric & Diana Freeburg	Greg & Wendy MacKenzie	John & Liz Stevens
Michael & Jeanne Fritz	Charlotte Mahrt	Bob & Ellie Sutherland

Legacy Society

MEMBERS

Chuck & Margy Truza

Gary & Margaret Valade

Jim & Merry Beth Valiquett

Ron & Gerri Vander Molen

Tom & Rose-Marie Venier

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, by phone at 734-717-8947 or email at slewis-lakin@fumcbirmingham.org or visit our website at www.firstlegacy.org.

Ways to Give

MAKE A DIFFERENCE

IRA Rollover Gift

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

Gift of Securities

Gift of 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.

...and giving can still BENEFIT YOU!

While tax laws have changed, there are still many ways you can make a gift to our congregation and make a difference. Even with the changes, making a gift to us can still provide benefits to you.

Visit our planned giving site at www.firstlegacy.org or contact Pastor Shawn by phone at 734-717-8947 or by email at slewislakin@fumcbirmingham.org to learn more about ways you can support our work and benefit this year.

BENEFICIARY DESIGNATIONS

A beneficiary designation is one of the simplest ways to make a planned gift to Birmingham and Berkley First. Retirement plans, IRAs, life insurance, donor advised funds, and annuities distribute assets based on beneficiary forms. With a simple form, you can update your beneficiary designations and specify the individuals and charities you want to support.

Designating Birmingham and Berkley First as a beneficiary is an easy way to leave a legacy of faithfulness.



www.firstlegacy.org



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

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