



ENDOWMENT NEWSLETTER 2024



BIRMINGHAM FIRST
BERKLEY FIRST
A UNITED METHODIST CHURCH

...gathered here for good.

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A letter from Rev. Shawn Lewis-Lakin

ASSOCIATE PASTOR FOR PLANNED GIVING



THANKS BE TO GOD!

As the 30th anniversary of our endowment ministry approaches (established in 1995), I celebrate the commitment and generosity of those who have built it into a vital tool for supporting mission and ministry. I am grateful for the dedication of our Legacy Society members and for all who believe that our congregation can and will positively impact lives, communities, and indeed the world, for generations to come.

Earlier this year, I shared with Dr. Boayue and the Staff Parish Relations Committee my decision to retire as the part-time Associate Pastor of Planned Giving, effective at the end of this calendar year. Retirement from my church employment will allow more time for travel, for consulting work with school boards, and, best of all, for being a more available dad and grandpa to my children and grandchildren. While I won't be leaving the area, I do anticipate spending more time at my house in Cadillac.

From the time Barb and I began worshiping at Birmingham First in 2015, to my appointment to full-time service in 2017, to 2020 when I transitioned into my current role, being part of Birmingham First has been a blessing for which I give glory and thanks to God.

I am excited about the positive difference being made in the world through ministries supported by endowment income. As you read through this newsletter, I hope you will join me in thanking God for those who, 30 years ago, had the foresight and faith to establish our endowment ministry. And I hope you will join me in praying for our congregation and how God will use it—and us—to positively impact the world for generations to come.

In Christ,
Pastor Shawn



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

ENDOWMENT BOARD

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ASSOCIATE PASTOR FOR PLANNED GIVING

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Doug Carvell

Jeff Cort

Gayle McGarvah

Claude Oleson

Holly Pisano

Bob Sutherland

Jim Valiquett

Lisa Wells

**Has passed on to Glory*

INVESTMENT COMMITTEE

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STAFF LIASON

Frank Turco

MEMBERS

Brett Bernard

Diana Freeburg

Kevin Heckman

Paul Keller

Mark Lachowicz

Colin Lennox

Rick Nauer

Andy Schueler

Frank Schweibold

SENIOR PASTOR

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

GRANTS PROVIDED

SCHOLAR IN RESIDENCE



"There will never be enough words to convey my gratitude to the Birmingham First United Methodist Church family of Michigan for the love demonstrated through its Endowment Funds.

On my own, I would never have imagined coming to the United States of America for a sabbatical that provided me with a cross-cultural experience. To date, I have been able to complete some research activities, live comfortably, and immerse myself in cross-cultural experiences. All of this has been made possible because of the Endowment.

To God be the glory for this awesome blessing, and thanks to my brothers and sisters of Birmingham and Berkley First for this opportunity."

Rev. Dr. George K. Weagba
Scholar in Residence, 2024-25

GRANTS PROVIDED

MISSION TRIP TO HENDERSON SETTLEMENT, FRAKES, KY



With assistance from a general endowment grant, 20 students from both Birmingham and Berkley First were able to travel safely to serve the community of Frakes, KY, through the work at Henderson Settlement. Our students lived out their discipleship by being the hands and feet of Christ as they worked with local children and painted an entirely new home for a family who had lost everything in a house fire. This experience not only allowed the students to make a tangible difference in the lives of others but also deepened their faith as they connected with the community through service.

Amy Holton
Former Student Ministries Coordinator



We are extremely grateful for the income from the Drinkard, Kernan, and Hermann Funds, which allowed approximately 40 children and youth from the Frakes, KY, community to experience a field trip to Pine Mountain State Park with our Volunteers in Mission (VIM) team during the week of July 14-20, 2024. These kids participated in archery, swimming in a pool, and putt-putt golf, many for the first time.

Sue Walters

GRANTS PROVIDED

INDIA MISSION, BANGLORE, INDIA

The India Mission in Bangalore, India, is incredibly grateful for the Endowment Funds they received this year. Living Hope Children's Home provides housing, food, healthcare, and education for nearly 100 children and, as you'd expect, they are always struggling to make ends meet. With the funds provided by the Drinkard Fund, Anton School was able to supply two uniforms for each of the 100 children, along with a new backpack for each child. Additionally, the Kernan Fund was used for much-needed capital improvements to the roof and the boys' shower and washroom area. These upgrades would not have been possible without the generous gifts from the Kernan Endowment Fund. Dhiraj and Kaylee John, our partners managing both Living Hope and Anton School, send their deepest thanks.

Linda Klepaczyk



GRANTS PROVIDED

CHILDREN & FAMILY MINISTRIES SUMMER INTERN



Income from the Steven Wells Fund has been critically important this year, allowing us to hire a summer intern. We hired Ashlyn Aubrey, who enthusiastically supported the preparation and implementation of Scuba Vacation Bible School, summer Sunday school, nursery care, and preparation for fall programming.

Kimberly Bowyer
Former Director of Children & Family Ministries

BRIGHTMOOR FREE STORE



With funding from the Reinhard and Kernan Funds, we were able to purchase toiletries and diapers for the Brightmoor Free Store, which provides essentials to hundreds of families every month in one of the poorest neighborhoods in Detroit. We are incredibly grateful for this funding, which supplements the in-kind donations of gently used clothing and household goods also available to shoppers at the free store.

Ken Hamel

CHRISTIAN HELP CENTER

The Christian Help Center (SKP HOPO) serves two types of clients, families and single women with children and the refugees from Ukraine. Since most of the people do not have jobs, they must find ways to get food to feed their families. The Center has a food pantry where they can get basics. This money will give the Center a big boost in purchasing food and other essentials for this pantry. Thank you for this support of a very worthy mission in the Czech Republic.

Donna Haymond



GRANTS PROVIDED

HAITI MISSION TEAM

Endowment Fund gifts to the Haiti Mission Team in 2024 enabled us to provide basic furnishings to homeless families for whom we built inexpensive shelter homes, as well as window curtains that offer comfort and security to the children at the Foyer des Petites orphanage. The gifts also allowed us to enhance the lab capabilities of Doctor Rosemond, who focuses on pre- and post-natal care and supports individuals with special needs.

John Smith



MINISTRY EDUCATION

Our church has a rich history of identifying, training, and equipping ministry leaders. I am deeply grateful for the support of Endowment and the Seminary Relations Committee as I begin my Doctor of Ministry program with Duke Divinity School. The Practical Church Leadership Certificate that Rev. Susie Hierholzer and I completed at Dakota Wesleyan University - and that Rev. Sarah Alexander is working on now - offers business training for clergy. Duke's Doctor of Ministry program brings me directly in touch with great theologians such as Bishop Will Willimon, Bishop Ken Carter, and Dr. Ellen Davis as I learn alongside a cohort of first-class clergy. I believe that this training will directly benefit Birmingham and Berkley First and empower us to continue to lead the region.

Rev. Zack L. Dunlap
Pastor of Next Gen Ministries



Rev. Zack L. Dunlap



Rev. Sarah Alexander



Rev. Susie Hierholzer



GRANTS PROVIDED

CHRISTIAN LIFE CENTER

THE CHRISTIAN LIFE CENTER IS IMPACTING LIVES

A general endowment fund grant proved to be the catalyst for reopening the Christian Life Center. Pickleball has helped to reenergize the presence of the CLC to the community. We've seen members come back to church who haven't returned post-Covid and it has brought in over \$25,000!

Rev. Sarah Alexander
Pastor of Congregational Care



BRIGHTMOOR BACKPACKS

With the generous funding we received from the Reinhard Fund, we provided backpacks filled with school supplies to 150 children in the Brightmoor neighborhood of Detroit, one of the city's poorest areas. The 45 Christian students from Birmingham and Berkley First (4th and 5th graders) played an integral role in this project, organizing the supplies and packing the backpacks as part of their summer camp mission experience. The backpacks were delivered to Brightmoor and distributed on August 17th.

Ken Hamel



GRANTS PROVIDED

CONGREGATIONAL CARE



The general endowment grants supporting our congregational care ministry have made a significant difference in strengthening connections within our church. Thanks to these funds, we've been able to provide meals for new parents. We have also supported families grieving the loss of a loved one. Additionally, we've renewed our focus on equipping lay volunteers to visit members, helping to foster a deeper culture of care in our congregation.

Rev. Sarah Alexander
Pastor of Congregational Care



Meal Prepping for a Member
after a Significant Loss



Delivering Coffee on a Visit

GRANTS PROVIDED

DUKE UNIVERSITY SEMINARY INTERN PROGRAM

Our Duke Divinity School summer intern program is supported by income from the Littleton Seminary Scholarship Fund and the Seminary Intern Fund. Our summer 2024 intern, Olivia Vermane, shares her reflections on her experience with us.



At the beginning of this summer, I did not want to go to Michigan. I did not want to travel 10 hours to be alone for 10 weeks with people I didn't know in a place I was unfamiliar with. And yet, God used this experience for growth, for good, and for grace.

Having no younger siblings or cousins of my own, I have had almost no experience with young children in my life. This summer I had the opportunity to work with children and youth for extensive periods of time, first for a week of

Vacation Bible School and then on a mission trip to Kentucky.

Through these experiences, I now feel more equipped and prepared to enter ministry upon graduation in May 2025. I learned that working with children is not as intimidating as I thought it would be. They are curious, they are kind, and they want to learn. They taught me not only how to be a good and faithful leader, but they reminded me how to be curious in an imagination-stifling world. I am endlessly grateful for each little one that I had the opportunity to meet this summer, and I am grateful for how they have helped me grow in ministry.

Having the opportunity to preach at the Berkley campus twice and at the Birmingham campus once, I also grew in my ability to recognize the contextual needs of the congregation. At Birmingham and Berkley First, I learned the importance of speaking into the lived experiences of those around me.

My experience in Michigan will be forever etched onto my heart. I may have gone unwillingly at first, but in August, I found it bittersweet to leave. My experience as a summer intern impacted my life both personally and vocationally in profound ways, and for that I am forever grateful.



Olivia "Liv" Vermane
Duke Seminary Intern 2024



GRANTS PROVIDED—LAST 5 YEARS

Berkley Worship Technology
Brightmoor Thanksgiving Meals
Communications Support
Congregational Care Ministry team Development
Cuba Mission Trip Support
Database, Server, and Sign-in Kiosk Upgrades
Discipleship Ministries Support
Endowment Dinners
First Taste Event
Haiti Orphanage Support
Hybrid Meeting Technology Hardware
India Mission Launch Events
Jumpstart Berkley Capital Campaign
Livestreaming Equipment Upgrades
New Passenger Van
Online Course: *Giving Thanks in Difficult Times*

Pastor of Congregational Care Salary & Housing Support
Podcast Production Equipment
Saving Grace Course Materials
Scholar In Residence
SPARK Worker Scholarships
Sunday Dinners
Support for Christian Life Center Reopening and Pickleball in the CLC
Support for Training & Salary Support for Finance, Operations, In-Reach, and Custodial Staff
Tapestry (online campus) Support
Tech Upgrades (tablets & laptop purchases)
200th Anniversary Committee
Workshop with Diana Butler Bass
Young Adult and Youth Ministries Support
Youth Choir Trip to England





Tapestry (Online Campus)



Endowment Dinner



Tapestry (Online Campus)



Student Ministries Motown Mission using the Passenger Van



Youth Choir Trip to England



Youth Choir Trip to England



Brightmoor Thanksgiving Meals



Brightmoor Thanksgiving Meals

As of August 31, 2024

2024 BY THE NUMBERS

GENERAL ENDOWMENT

01/01/2024 Balance	\$ 4,826,219
Total Receipts (Including from Gift Annuities)	\$48,450
Interest, Dividend and Market Appreciation	\$578,903
Expenditures	(\$87,078)
08/31/2024 Balance	\$5,366,494

NAMED ENDOWMENTS

01/01/2024 Balance	\$3,511,724
Total Receipts	\$50,000
Interest, Dividends, and Market Appreciation	\$421,212
Expenditures	(\$46,289)
08/31/2024 Balance	\$3,936,647

GIFT ANNUITIES

01/01/2024 Balance	\$505,286
Total Receipts	0
Interest, Dividends, and Market Appreciation	\$56,645
Expenditures (Including to Gen. Ed)	(\$16,328)
08/31/2024 Balance	\$545,603

OUR CONGREGATION'S ENDOWMENT FUNDS

The Endowment Board oversees the General Endowment, Named Endowed Funds, and Charitable Gift Annuities. Combined, these funds produce over \$280,000 in annual revenue to support the ministry and mission of Birmingham and Berkley First.

GENERAL ENDOWMENT

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, memorials, and gifts."

In 2024, General Endowment income available for uses aligned with this purpose is \$180,273. This was combined with \$104,639 in carryover from 2022, making a total of \$284,912 available. The Endowment Board receives and considers grant requests from various ministry areas. Through the end of August, \$188,745 has been awarded or spent. Additional spending will be approved before the end of 2024. For information on Endowment Board meeting dates and guidance on how to prepare a grant request, contact Pastor Shawn.

NAMED ENDOWMENTS

In addition to our General Endowment, we are fortunate to have fifteen active named endowed funds. These named funds were established with significant gifts to support designated purposes. Their uses are restricted to the purposes articulated in the agreements that established the funds.

At the beginning of each calendar year, the appropriate committee chairs and staff members responsible for ministry areas that can 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. A total of \$102,644 will be spent in 2024 from named funds.

GIFT ANNUITIES

A charitable gift annuity (CGA) is a contract between a donor and Birmingham First that provides the donor with a fixed income for life in exchange for a donation. Birmingham First invests the donation and pays the donor a fixed amount each year, based on their age, life expectancy, and the number of beneficiaries. Birmingham First receives the remaining balance of the gift after the donor's lifetime. Members and friends of our congregation interested in learning more about gift annuities should contact Pastor Shawn.

A GATHERING FOR GOOD
Concert & Workshop

*Carrie
Newcomer*

APRIL 5-6, 2025



MARK YOUR CALENDARS

A Gathering for Good with Carrie Newcomer

We're excited to announce a special opportunity in place of our traditional Endowment Dinner for 2025—a weekend of music, poetry, and reflection with the renowned artist Carrie Newcomer. Carrie will perform a concert in the sanctuary of Birmingham First on Saturday, April 5, and will also share her music in worship on Sunday, April 6. Following the service, she'll lead a workshop that promises to inspire and engage our community.

While we recognize that many look forward to our Endowment Dinner each year, we are more than confident that this unique weekend experience with Carrie Newcomer will be long remembered. Carrie is a songwriter, recording artist, performer, educator, and activist, celebrated for her deep spiritual themes and captivating performances. The Boston Globe calls her a "prairie mystic," and Rolling Stone Magazine notes that she "asks all the right questions." With 20 nationally released albums, three books of poetry and essays, and accolades including a Grammy and an Emmy, Carrie's work brings an extraordinary blend of artistry and progressive spiritual themes.

Known for her resonant voice—"as rich as Godiva chocolate," according to *The Austin American-Statesman*—Carrie's music and poetry will create a space for us to gather as a community in reflection and joy. The Endowment Board is thrilled to bring this inspiring weekend to Birmingham First.

Plan now to be part of this memorable weekend with Carrie Newcomer on April 5-6, 2025.

AN IMPORTANT NOTE ABOUT QUALIFIED CHARITABLE DISTRIBUTIONS

Individuals aged 70½ or older can make a Qualified Charitable Distribution (QCD) of up to \$105,000 from their IRA directly to Birmingham First without incurring income tax on the withdrawal.

This contribution can satisfy part or all of the individual's annual required minimum distribution. You will not be taxed on what would have otherwise been a taxable distribution, and you can still take the standard deduction! The tax advantages of making Qualified Charitable Distributions are significant.

Shawn Lewis-Lakin, Associate Pastor for Planned Giving, is available to discuss this and other tax-advantaged gift strategies with you.



GIFTS OF APPRECIATED STOCKS, BONDS & MUTUAL FUNDS

A gift of appreciated securities offers significant benefits, including an immediate charitable deduction for the full market value of the stock and the avoidance of capital gains taxes that would typically apply upon sale.

Instructions for donating appreciated assets to Birmingham First can be found at www.fumcbirmingham.org/donatestock. Shawn Lewis-Lakin, Associate Pastor for Planned Giving, is available to discuss this and other tax-advantaged gift strategies with you.

Legacy Society Member Feature: Dawn Pfaff

A LEGACY OF HELPING



When Dawn Pfaff was in third grade, her dad gave her a cherished picture of Jesus that he had owned since childhood. He explained how Jesus had watched over him since he was a child, and he wanted Dawn to know that Jesus would watch over her as well. This has been true throughout her life.

Growing up, Dawn attended Central United Methodist Church in Waterford. Among other activities, she sang in the choir under the direction of Mrs. Pelton (*Yes! That's Eric Pelton's mother!*). As a young adult, Dawn drifted away from organized religion but not from her faith. She married Tom Pfaff in the courtyard of Waterford Central UMC on a Thursday night—choir practice night—and the choir provided the music for their wedding.

When Dawn, Tom, and their family moved to Bloomfield Hills, Dawn began attending Birmingham First. It was here that she met Thelma Wilmoth, whose warm welcome drew her in and solidified her commitment to the congregation. Balancing a full-time job and raising a family with Tom, Dawn contributed to her church family as best she could, helping with Sunday School and serving as an usher.

In her late thirties, Dawn made a career change from IT management to real estate. When she learned that the church was seeking assistance in the finance office, she discussed with Joan Benner how she might help. Initially, Dawn worked with Joan “as needed,” filling in during illnesses and providing extra support during busy times of the year. In 2009, she officially joined the church staff as a part-time finance office associate.

As she juggled her increasingly busy real estate career with her work at the church, Dawn considered leaving but ultimately decided to stay, realizing that working at the church brought her immense joy. Dawn reflects, “Working at the church has been such a gift to me. I have seen firsthand how generous our congregation is and what an incredible difference the funding we provide makes in the lives of those in need.”

In June of 2022, Dawn's husband, Tom, died suddenly. The support she received from her church family provided Dawn with the strength she needed during those incredibly difficult days. In offering his support, Dr. Boayue reassured her by saying, “The Lord is not done with you yet.” Time and again, in the months that followed, Dawn felt drawn back to those words.

Fast forward to August 2024, and Dawn is again a student, beginning a Master of Counseling degree program through Central Michigan University. Throughout her life, Dawn has held various job titles, but she has always been a helper, a listener, a keeper of stories, a

support, and a friend. Now, responding to God's persistent call in her life, she is again committed to using her gifts to serve others, but this time as a counselor.

After Tom's death, Dawn needed to take on the financial planning responsibilities that had been his. In working through her financial plan, she recognized the vital role of Birmingham & Berkley First in her life and decided to name the church as the beneficiary for a portion of her qualified assets.

Dawn shares that while the Wesleyan adage to "do all the good you can, by all the means you can, in all the ways you can, in all the places you can, at all the times you can" has always resonated with her, it has now become the guiding vision for her life as she enters this new way of doing good. Thanks be to God for Dawn, for those who have supported her along her journey, and for the many people she has helped and will continue to help.

PLANNED GIVING OPTIONS

The General Endowment Fund supports a range of ministries. Money is dispersed from the General Endowment by the Endowment Board in response to grant requests. Many donors choose to leave their legacy to the General Endowment Fund, which provides maximum flexibility for future ministry needs.

Other donors prefer to support specific ministry areas. Any size gift may be directed to one of six separately established endowment funds that support specific ministry areas:

- Continuing Education
- Missions & Outreach
- Worship & Music
- Scholarships
- Children & Youth
- Building & Grounds

Named Funds may also be established. Creating a designated Named Fund requires a minimum donation (or bequest) of \$75,000, with the purpose specified by the donor.

Some donors may not be interested in permanent endowed funds but prefer to make a planned gift—either during their lifetime or as a bequest—to be expended over a defined period for a specific purpose. You may establish a fund with a gift to a specific ministry area, which can be completely spent down over a period of years. For example, a member might designate a bequest of \$100,000 for youth ministry to be spent down within a selected timeframe, such as 10 or 20 years, or by a specific date.

To learn more about options for planned giving and strategies for making such gifts, contact Pastor Shawn Lewis-Lakin, our Associate Pastor for Planned Giving.

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
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	Provide subsidies for special musical concerts
The Claude and Caroline Stevens Youth Fund	Provides monies for youth projects – any project that will benefit the youth of the church, middle school through college ages

NAMED FUNDS

SUMMARY

FUND NAME	PURPOSE
The Steven Wells Fund	Support discipleship ministries (Christian Education) for children and youth
James and Carol (Blades) Rillema Fund	Support local 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

In addition to our General Endowment, the Endowment Board oversees Named Funds established for specific purposes. Expenditures from these funds are restricted to programs and projects that align with each fund's mission. If you are passionate about a particular area of ministry supported by a Named Fund, please consider making a directed contribution. For more information, contact Pastor Shawn at slewis-lakin@fumcbirmingham.org or 734-717-8947.



LEGACY SOCIETY MEMBERS

Legacy Society members have made a significant life gift to the endowment fund, have a current planned gift with the Endowment, or have indicated they have a planned gift in their estate.

Anonymous (4)	Lois Gaigalas*	Robert & Sukie* McNutt
Shedrick & Ryan Abney	Bob Gillow	Ron & Gerri Vander Molen
George Miller & Faye Louise Baker	Bill & Barbara Goode	Gwen Moore
Dr. Ralph* & Nancy* Bauer	Mary Goyeau	Howard R. "Skip" Neilson*
Barb Baughman	Fred & Judy Green	John & Sharon Newman
Dwight* & Joan Benner	Chris & Doris Hall	George* & Mary Ann Newton
Lon Bone	Rev. Gary & Bishop Laurie Haller	Susan & Claude Oleson
Linda Buchanan	Rev. Dr. John E. & Judy Harnish	Bill* & Jane Pettibone
Doug & Jane Carvell	Esther Heussner*	Dawn Pfaff
Jim & Katie Davis	Clare* & Kay Higby	Barb Pobst
Roy* & Teena* Dickerson	Jeff & Mixie Hockman	Ed* & Sharon Pugh
Tim & Laura Dickerson	Russ & Sue Ives	Jan Query*
George & Susan Dilgard	Sam & Tove Jackson	Duane & Deanna Ralston
Frank & Carol Driscoll	Fran Jones*	Doug Reinhard*
Geri Dunkle	Jenny & Peter Kanefsky	Roy Reiterman*
Rev. Zack & Rev. Rachael Dunlap	Paul & Jackie Keller	James & Carol Rillema
Fran & Janette Engelhardt	Anna & Austin Kendall	Rev. Dr. William & Kris Ritter
Aileen Erdmann*	Connie & Joe Kenty	Richard & Lin Schoelch
Janice Erichsen*	Jerry* & Greg LaBrake	Toni Segitz
Brady & Tiffany Ericson	Eric & Candace Law	Richard & Sara Shirley
Lynn & Jan Evans	Rev. Shawn & Rev. Dr. Barbara* Lewis-Lakin	Shane & Anna Spradlin
Bob Everson	Ann Littleton	Joyce Stanton*
Bob & Mary Feldmaier	Greg & Wendy MacKenzie	John & Liz* Stevens
Brent & Amy Fitch	Charlotte Mahrt	Bob & Ellie Sutherland
Margaret Fitts	Mick & Sarah McClelland	Richard* & Donna* Sutton
Don & Sue Foehr	Pauline McClew*	Chuck & Margy Truza
Eric & Diana Freeburg	Gayle McGarvah	Gary* & Margaret Valade
Michael & Jeanne Fritz		Jim & Merry Beth Valiquett

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

LEGACY SOCIETY MEMBERS

Legacy Society members have made a significant life gift to the endowment fund, have a current planned gift with the Endowment, or have indicated they have a planned gift in their estate.

Tom & Rose-Marie Venier	Steven* & Lisa Wells
Peggy A. Walker	Dorothy Willison*
Sue Walters	Zeno & Ann Windley
Tom Henderson* & Susan Waun	George & Julie Work

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

If you have already included Birmingham First in your estate plans or would like more information about planned giving, please contact Rev. Shawn Lewis-Lakin, Associate Pastor for Planned Giving, via email at slewis-lakin@fumcbirmingham.org or by phone at 734-717-8947. You can also visit our website at www.firstlegacy.org for additional details.



Endowment Dinner 2024 at Birmingham First from left to right, Rev. Shawn Lewis-Lakin, Bishop Will Willimon, Rev. Susie Hierholzer, Rev. Dr. Bill Ritter, Rev. Zack L. Dunlap, and Rev. Sarah Alexander

WAYS TO GIVE

Bequest

Designate our congregation as the beneficiary of your assets through a will, trust, or beneficiary designation form.

IRA Rollover

Congress has enacted a permanent IRA charitable rollover, allowing you to make an IRA rollover gift this year and in future years.

IRA to Gift Annuity Rollover

If you are 70½ or older, you can make a one-time IRA rollover to fund a charitable gift annuity and receive fixed payments for life.

Beneficiary Designation Gifts

You can designate us as a beneficiary of a retirement, investment, or bank account, or your life insurance policy.

Charitable Gift Annuity

Transfer your cash or appreciated property to our congregation in exchange for our promise to pay you fixed payments (with rates based on your age) for the rest of your life.

For more information about these options, visit www.firstlegacy.org or contact Pastor Shawn at slewis-lakin@fumcbirmingham.org or 734-717-8947.

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. By completing a simple form, you can update your beneficiary designations to specify the individuals and charities you wish 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

...gathered here for good.™



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