



## **Frequently Asked Questions**

The Mid-Atlantic United Methodist Foundation assists your congregation in meeting its investment and stewardship goals. Pooling the resources and potential of more than 392,000 United Methodists in 1,700 churches, we provide professional, personalized consultations to enable your church to grow your assets while minimizing risks. Through the Foundation, each of the socially responsible investments is screened to ensure it is in keeping with United Methodist values and principles. In addition, as partners in your stewardship journey, the Foundation will help your church to create a culture of generosity that permeates through every aspect of your congregation's life.

### **Q: Why should our church utilize our local Mid-Atlantic United Methodist Foundation?**

A: The bottom line is that the Foundation is the best at what it does – creating opportunities for giving and investment that enables your church to accomplish all God is calling it to do and be. The Foundation:

- Has competitive investment returns with the nation's leading investment firms;
- Can suggest a wide array of personalized investment strategies tailored to the needs of your church;
- Shares connectional values and enables affluent churches to assist and grow those churches that might have less;
- Uses money to do ministry, building a better, more just world through socially responsible investing;
- Gives funding to a variety of missions and ministries in the Eastern Pennsylvania, Peninsula Delaware and Baltimore-Washington Conferences;
- Trains churches on best practices in stewardship;
- Shares resources on endowments, trusts and planned giving;
- Provides speakers to inform, inspire, and engage churches in transformative stewardship.

### **Q: Can't I just use someone from my own church? We have someone in our church who has handled our investments for years.**

A: The Foundation will work carefully in consultation with the stakeholders in your congregation to ensure their expertise and gifts are used to benefit the church. However, because of the sometimes sensitive and volatile nature of finances and investments, it is not

recommended to have a single person in the pews overseeing these important decisions. We recommend that members provide oversight and work with the Mid Atlantic United Methodist Foundation. In addition, by investing with the Foundation, it allows your church to be connectional, assisting others in the denomination by helping them invest in a vital future as well.

**Q: What other benefits are associated with the Foundation's services?**

A: As partners in ministry, the Foundation offers a number of free services to our local churches, including a number of materials on a variety of stewardship topics that can be instrumental in helping a church set up an endowment or to begin a program of intentional "Planned or Legacy" giving. The Foundation also provides at no cost (to the church) gift stock programs where a donor can provide the full market value of a stock to the church. Members of client churches may receive discounts to many of the Foundations programs.

**Q: What does the Foundation do in addition to investment management?**

A: Some highlights for the year 2015 included:

- Successfully Launched the two-year **Financial Leadership Academy (FLA)** program committed to financial educational training for pastors.
- The distribution of **over \$7.6 million** in ministry funds to our client churches.
- Matching grants of more than \$30,000 were made to ministry and relief efforts.
- Sponsored the Rev. Clif Christopher, author of "Not Your Parent's Offering Plate," three times for financial stewardship training.
- Sponsored Orlando Magic Sr. VP and Motivational Christian Speaker Pat Williams.
- Is the fastest growing United Methodist Foundation in the United States for the past five years.
- Added Fixed Income Manager GW&K Boston, Massachusetts
- Investment process continues to place us in the top 10% of United Methodist Church SRI investment managers.
- Average increase in giving indication was **13.5%** during Foundation led Stewardship Sundays.

One-hundred percent of assets invested through the Mid-Atlantic United Methodist Foundation are committed to be managed according to the Social Principles of The United Methodist Church as established in the Book of Discipline. Foundation staff helped numerous churches set up their investment, gift, and disbursement policies, while providing much Stewardship information and materials. Many Endowments have been started with the Foundation's help.

**Q: Who is the Mid-Atlantic United Methodist Foundation?**

A: The Mid-Atlantic United Methodist Foundation was established by merger in 2010 for the purpose of fostering and supporting benevolent ministries in the name of Jesus Christ, and to serve as an extension of the religious, charitable and educational endeavors of the Eastern Pennsylvania Conference of The United Methodist Church, the Peninsula Delaware Annual Conference of The United Methodist Church, and the Baltimore Washington Conference of The United Methodist Church. We are incorporated under the Nonprofit Corporation Law of Pennsylvania exclusively for charitable purposes and are intended to be a public charity under the provisions of the Internal Revenue Code of 1954 as a 501(c) non-profit corporation.

**Our Governing Board of Directors**

Our Board of Directors is a composite of both Clergy and Laity members of The United Methodist Church. We have a Board of Directors that is comprised of representatives of the Eastern Pennsylvania, Peninsula Delaware, and Baltimore-Washington Annual Conferences. All board members are appointed to serve a four-year term with an option to serve an additional four-year term. Annual Conference treasurers are considered permanent members of the board. Permanent committees of the board include the Executive, Investment, Personnel, Marketing, Stewardship and Audit committees. The Members of our corporation are each Annual Conference's Council on Finance and Administration.

**The Executive Director**

Daily business operations of the Foundation are administered by the Executive Director of the Foundation. The Executive Director is supported by four staff including the Associate Director, Frank Robert; our Operations Manager, Tracy Brown; the Rev. Andy Lunt as the Dean of the Financial Leadership Academy; and Program Director, Jeanne Mackowiak. While independent of the conferences, the corporate office of the Foundation is hosted within the Eastern Pennsylvania Annual Conference office in Valley Forge, Pa., with an additional office within the Baltimore-Washington Annual Conference office.

**Q: What is the Foundation's Mission and Ministry?**

A: Stewardship and Planned Giving: The Foundation conducts leadership programs in planned giving and church stewardship as part of its important mission and ministry. January 2015 saw the launch of the Financial Leadership Academy (FLA) for pastors, specifically designed to enhance clergy skills in this area. We offer advice and counsel to members, families, local churches, agencies, and boards on how to promote legacy or transformational gifts for the future of The United Methodist Church. We specialize in developing Church Endowments.

Investment and Asset Management: Our investment advisory and asset management operation is available to churches, groups, and agencies seeking a way to have invested and endowed assets managed in accordance to the guidelines outlined in the United Methodist

Book of Discipline. The Mid-Atlantic Foundation does not contemplate self economic gain or profit from our work and ministry. Profits from managing client assets are directly reinvested for the betterment of The United Methodist Church and the churches for whom we manage assets.

**Q: How does the Foundation manage investments?**

A: Our Investment Management product is deployed using a number of contracted investment management professionals, creating portfolios for equity and fixed income investments diversified across a broad spectrum of asset classes and categories. All our investments are screened at the time of purchase against the General Board of Pension's list of restricted securities thereby assuring every effort to comply with The United Methodist Church's social principals outlined in the Book of Discipline.

**Our Investment Managers**

**Recordkeeping Services;** Fulton Bank, Lancaster Pennsylvania

**Core Index Fund;** Capstone Asset Management Company, Houston, Texas

**Value Manager;** Boston Partners, Boston Massachusetts

**Growth Manager;** Fulton Financial Advisors, Lancaster Pennsylvania

**SMID Small & Mid Cap Manager;** SouthernSun Asset Management, Memphis Tennessee

**International ADR Manager Developed;** Capstone Asset Management Company, Houston Texas

**International ADR Manager Emerging;** Renaissance Investment Management, Greater Cincinnati Ohio

**Short Fixed Income;** Vanguard, Frasier Pennsylvania

**Fixed Income Core;** Federated Securities, Pittsburgh Pennsylvania

**Fixed Income Aggregate:** GW& K, Boston, Massachusetts

Investment Managers performance is reviewed monthly and measured against various established benchmarks. The Foundation Investment Committee conducts a quarterly conference call with each manager and reports the findings to the Board of Directors. An annual presentation is made on a rotating basis by each investment manager during one of our quarterly board meetings. Additionally, all Foundation business is subject to an annual audit by an independent audit firm in association with the board's Audit Committee.

**Q: What is the Foundation's Investment Committee?**

A: This committee is responsible for reviewing and recommending the specific investment allocation and assets assigned to each of our investment managers. The Foundation Board has established guidelines governing the management of our investments including written

“Investment Policies” and “Investment Procedures.” The Foundation makes these guidelines available at no charge to any church looking to establish written policies for the management of invested and endowed assets at the church level. The Board of Directors is responsible for monitoring investment manager’s performance against the selected benchmark target.

**Q: What is your future outlook and growth?**

A: On July 1, 2012, the Foundation’s investment management product was named “**Genesis Funds**” to better identify and further develop the unique Methodist Church social screening process the MAUMF uses. Additionally, the MAUMF launched a SRI (socially responsible investing) screened S&P 500 Index Fund, the first of its kind as a core product to the foundations investment management options.

We are expanding our use of technology, video, and the web in the delivery of our unique investment and stewardship services. The goal is to strengthen the ability of the Foundation to provide additional ministry and mission resources to the Annual Conferences we serve, strengthen the financial health of The United Methodist Church, and make disciples of Jesus Christ.

**Q: How was the Mid-Atlantic United Methodist Foundation, Inc., formed?**

A: The Mid-Atlantic United Methodist Foundation, Inc., was formed July 1, 2010, as a result of the merger of the Eastern Pennsylvania-Peninsula United Methodist Foundation, Inc. and The United Methodist Stewardship Center and Foundation of the Baltimore-Washington Conference, Inc. The new organization is headquartered in Valley Forge, Pa., under the corporate laws of the State of Pennsylvania with an additional office in Fulton, Md. The new Foundation serves the Eastern Pennsylvania, Peninsula-Delaware and Baltimore-Washington Annual Conferences of The United Methodist Church and conducts business in the states of Pennsylvania, Delaware, Maryland, West Virginia, and the District of Columbia. A formal “Resolution of Merger” vote was passed at each Annual Conference Meeting in the spring of 2010.

**Q: Where can I find additional information?**

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## Q: Who are Jack Brooks & Frank Robert?

A: **Jack Brooks** is the Executive Director of the Mid-Atlantic United Methodist Foundation, a Financial Foundation managing investments for individuals and organizations affiliated with The United Methodist Church. Investments with the Foundation are managed in accordance with the social principals of The United Methodist Church and are outlined in the UMC's *Book of Discipline*. Prior to joining the Foundation, Jack, had a 25-year career as a licensed Registered Representative and Vice President working with the investment firms of Morgan Stanley and Dean Witter. In 2002, he became a partner with Borer Denton and Associates, a wealth management firm. Jack is a Certified Retirement Counselor (CRC) and Certified Financial Planner (CFP).



Jack devotes much of his free time to non-profit community organizations and fundraising. Currently he serves as the Chairman of Radnor Studio 21, a community television station in Radnor Township, Pa., and as President of the Ocean City Lifeguard Alumni Association in Ocean City NJ. Jack is a Board Member of the Wayne Business Association, Wayne Senior Center, and the Philadelphia Wooden Boat Factory.

Jack holds a BS in Hotel and Restaurant Management from James Madison University in Harrisonburg, Va., and attended The Pennington School founded in 1838 by the New Jersey Conference of The United Methodist Church as a Methodist Episcopal Seminary.

**Frank Robert** is the Associate Director of the Mid-Atlantic United Methodist Foundation, a Financial Foundation managing investments for individuals and organizations affiliated with The United Methodist Church. He is based out of Fulton, Md., in an office in the Baltimore-Washington Conference Mission Center. Investments with the Foundation are managed in accordance with the social principals of the United Methodist Church and are outlined in the UMC's *Book of Discipline*. He loves being able to help the diverse groups of Churches from inner city to suburbia to country churches.



Prior to joining the Foundation, Frank graduated with a History degree from the College of William and Mary in Virginia, and then went on to be a Teacher, Coach, College Administrator and a Medical Sales Representative. He has both a Masters degree in Higher Education from the College of William and Mary in Virginia and a Masters degree in Business Administration from Loyola University Maryland.

Frank devotes much of his free time to community organizations. A Rotarian and former President of the Town Council of Sykesville, Md., he enjoys coaching youth for the Freedom Recreation Council in Eldersburg. He has been honored to represent St. Paul's United Methodist Church in Sykesville at the Baltimore-Washington Annual Conference and ESCAPE ministries. Frank is blessed with two wonderful daughters, one in high school and the other attending Clemson University's Nursing program. His wife, Beth, teaches special needs children for the Carroll County Public School system and assists a special needs Ice Hockey team in Baltimore.