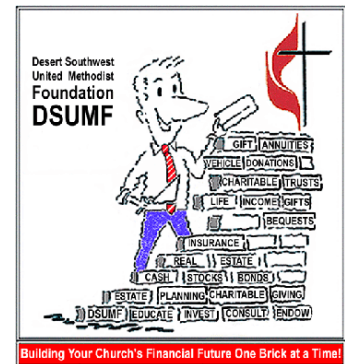


Mission Statement

The mission of the Desert Southwest United Methodist Foundation is derived from the purposes of a Conference Foundation as detailed in ¶2513 of the **Book of Discipline**. The purposes are:



1. To provide services as described in ¶2512.3, which involves receiving, collecting, holding, and administering, in trust, donations, bequests and devises of any character for any benevolent, charitable, or religious purpose.
2. To promote planned giving programs on behalf of local churches, conferences and general Church boards and agencies.
3. To furnish counsel and guidance to local churches with regard to promotion and management of permanent funds, and
4. To attend to other responsibilities as determined by the annual conference.

The **Desert Southwest United Methodist Foundation (DSUMF)** is a separately incorporated 501 (c) (3) non-profit organization. The Foundation operates as a Service Bureau for the Agencies, Boards, and Churches of the Desert Southwest Annual Conference of the United Methodist Church.

As The Foundation for the Desert Southwest Annual Conference, our mission is to provide educational, investment and consulting services to your church, agency or board so you can fulfill your ministry with a secure financial future.

To accomplish this mission, the Foundation provides three areas of service: 1) the Educational Service Program, 2) the Investment Service Program and, 3) the Consulting Service Program. The **Educational Service** is designed to teach every member of every church the importance of becoming a good steward of his or her own assets. It is known that when people learn to become good stewards of their own assets in a church setting, they will transfer that knowledge into helping their church to become a good steward of its assets. The Educational Service includes seminar presentations in the areas of Estate Planning, Charitable Giving and creating Permanent Endowment Funds. These seminars are provided **free of charge and upon request**.

Unlike the Educational Service Program, the Investment Service is not for individual members of our churches. Rather, the **Investment Service** is for agencies, boards and churches of the Annual Conference that have long-term (3-5 years) funds to invest. All funds received by the Desert Southwest United Methodist Foundation are added to its existing Commingled Fund. These funds are administered by the Foundation's Executive Director and are overseen by the Foundation's Investment Committee and Board of Directors. To invest the Foundation's portfolio, DSUMF employs the services of Financial Advisors through Wells Fargo Advisors, LLC and professional asset managers. The portfolio is a balanced one with 60% invested in equities, 20% invested in bonds and 20% invested in managed futures. Each professional asset manager invests a specific portion of the

portfolio as determined by the Foundation's Asset Allocation Model and in accordance with the Foundation's Investment Guidelines, which are consistent with the Social Principals of The Church.

The Investment Service is a fee-based program. For deposits in the 60/20/20 Asset Allocation Model, the Foundation charges an annual investment management fee. The fee is assessed monthly and is used to offset the Foundation's expenses associated with the costs of managing, trading, and accounting for and auditing investment accounts.

A "Your Choice" Investment Service permits depositors with minimum deposits of \$1,000,000 to choose their own asset allocation. "Your Choice" Investment Service Fees range from 1.13% to 2.06% per year depending on the amount of the deposit and the asset allocation chosen. For more information about this service call us at 602.266.6956.

The third category of services provided by DSUMF involves our **Consulting Services**. DSUMF provides personalized consulting services for local churches in the area of Annual Stewardship.

Each of these services is conducted at and for local churches, boards, and agencies. Each of these services can and should be incorporated into every agency, board and church of the Annual Conference so as to achieve each of the three Annual Conference Priority Areas, including: 1) Develop and encourage an ongoing culture of Social Holiness, 2) Develop and encourage an ongoing culture of Leadership Development, and 3) Develop and encourage an ongoing culture of Planting New Churches and Communities of Faith.

For additional information contact the Foundation by calling 602-266-6956 or 1-800-229-8622, emailing at foundation@dsumf.org or writing to 1550 E. Meadowbrook Ave., Phoenix AZ 85014-4040.