

## MEMO

**TO:** Agency Depositors  
**FROM:** Rick Brown, Ed.D., CFRE; Executive Director, DSUMF  
**RE:** Monthly Statements  
**DATE:** Monday, November 10, 2003

The Rate of Return (Net of Fees) for October was: + 2.694%  
The Rate of Return (Net of Fees) for the Y-T-D is: +10.868%

A comparative chart of the Foundation's Portfolio Performance vs. the Major Indexes is shown in the chart below.

<u>Index</u>	<u>Rate of Return for Oct. (Gross of Fees)</u>	<u>Rate of Return for Y-T-D (Gross of Fees)</u>
S & P 500	+5.50%	+19.42%
DOW Jones Industrial	+5.67%	+17.50%
NASDAQ	+8.13%	+44.68%
Foundation (Gross of Fees)	+2.85%	+12.47%

### We're back into double-digit positive returns!

Major economic indicators continue to point towards a recovering economy and a positive 4<sup>th</sup> Quarter for 2003. If these indicators are accurate, then our double-digit positive returns may be slightly larger than they are now by year's end.

At this point in time, there is one Sunday available for an **Estate Planning Seminar** presentation in 2003; it is 12/14/03. However, to allow for proper advertising, you should schedule your seminar one month in advance. Therefore, if you want the December 14<sup>th</sup> date that is open, you must **book it now!** There are still plenty of weeknight dates available. We've already scheduled 16 seminar dates from January to March in 2004, so please book your Spring 2004 seminar date ASAP!

Your church would benefit from a **Gift Annuity Program**. Such Programs are **Win-Win-Win** scenarios with no downside. Several churches have already secured hundreds of thousands of dollars for future ministry activities by hosting a Gift Annuity Seminar. Don't delay. Call me now! Lets get started on your Gift Annuity Program immediately.

Our **Vehicle Donation Program** generated over **\$7,000 net dollars** for various Annual Conference ministries in the month of **October alone!** If you would like to participate in this program and raise some funds for your church or ministry, please call.

If you ever have any questions or would like a presentation about any of our educational, investment or consulting services, then please contact us at your convenience by phone: 602.266.6956, fax: 602.265.1524 or contact us by e-mail: [www.dsumf@earthlink.net](mailto:www.dsumf@earthlink.net).

We also produce a pretty informative Website, if I don't mind saying so myself. Please visit us on the web at [www.desertsw.org/foundation.html](http://www.desertsw.org/foundation.html). Click on Newsletters to see our new **DOLLAR SENSE** publication. It is full of all the important information you need to secure a solid financial future for your church. As always, we appreciate your trust.

*Please Make a Gift to Your Church Through Your Estate Plan!*

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