

FREQUENTLY ASKED QUESTIONS



METHODIST FOUNDATION
OF MISSISSIPPI

Does the Annual Conference leadership know who has an account with the Foundation?

NO. *All* accounts are held in the strictest confidence.

Does the General Conference or Local Conference control the funds at the Foundation?

NO. We are separately incorporated with a separate staff and Board of Directors.

Who may withdraw funds from the Foundation?

Only those authorized signatories on file with the Foundation may withdraw funds.

How is the Methodist Foundation of Mississippi related to the Mississippi Conference?

The Foundation supports ministry of the Conference and local Methodist or Wesleyan heritage churches.

If a church's affiliation changes, will the Methodist Foundation of MS still work with that church?

The Foundation will serve any church or organization that is of a Methodist or Wesleyan heritage.

CONTACT US

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INVESTMENT OPPORTUNITIES

Often, local churches feel their only investment opportunities are through CDs held at a local bank. Usually, the rate of return is low, and funds are locked in for an agreed-upon amount of time, from 3 months up to 5 years. Collecting income from a CD before its maturity reduces the rate of return on the investment. The Methodist Foundation of Mississippi was created to maximize the investment income for Methodist churches and organizations with greater access to their funds. We offer two investment opportunities to our partners.

Short Term Fund

Our Short-Term Fund opportunity allows your church or organization to utilize our investment portfolio without the risk of losing your principal. It pays a variable interest rate to accounts (currently 2%), and funds can be withdrawn within 1-3 days with no cost or penalty. This fund is designed to beat most CD rates of returns while allowing quick access to fund accounts.

Long Term Fund

Our Long-Term Fund opportunity allows churches willing to assume some risk and intend for longer-term investments to invest in current markets with very low costs. Fund growth is based on recent market growth that historically has been over 5.5%, with years above and below the average.

Endowments

Churches, cemeteries, and organizations can utilize our endowment management services to ensure income in perpetuity. Our staff will work with individuals or organizations to create legacy gifts designed to continue their ministry throughout their lifetime.

Scholarship Resourcing

Our Foundation works with stewardship organizations to collect and communicate about modern stewardship development to our churches and organizations. Our partners can use us as a resource for campaign planning and stewardship programs.

Donor-Advised Funds

A donor-advised fund, or DAF, is like a charitable investment account for the sole purpose of supporting charitable organizations you care about.

When you contribute cash, securities, or other assets to a donor-advised fund at a public charity like The Foundation, you are generally eligible to take an immediate tax deduction. Then those funds can be invested for tax-free growth, and you can recommend grants to virtually any IRS-qualified public charity.

You want your charitable donations to be as effective as possible when you give. Donor-advised funds are the fastest-growing charitable giving vehicle in the United States because they are one of the easiest and most tax-advantageous ways to give to charity. There are no fees to the individual with our DAF program.

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