

## Springboard

### Inspiring people to care forever

National charities and universities have a long history of establishing and promoting endowment funds. Salvation Army, America Red Cross and the American Cancer Society are good examples of national charities



that have emphasized endowment giving — and reaped the rewards of this approach in advancing their missions.

Heartspring has long been a partner to churches interested in developing and promoting endowment funds. Such dedicated sources can be tailored to support everything from the ongoing operational needs of a church to funding specific causes or ministries. While some churches in our conference have had one or more active endowment funds in place — often for decades — others have yet to take advantage of the opportunity.

A pastor recently told me he received a call from a member who was revising her estate plans and wanted to leave a generous estate gift to the church's permanent endowment fund. She was surprised and disappointed to find out the church did not have such a fund! Church leadership had talked about endowment, but been concerned about starting such a fund without initial significant capital. This phone call was a great reminder of the importance having such a fund, even if it starts small.

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### HEARTSPRING METHODIST FOUNDATION

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# Spirit

## Wesley Community Center provides path to financial success

**HEARTSPRING GRANT** recipient Wesley Community Center (WCC) is confronting poverty head-on and changing lives through its outreach programs. Its Financial Opportunity Center (FOC) brings together programs and resources to focus on four core areas: education, career development, income support and financial coaching to help clients succeed.

Since 2010, the FOC has helped 299 clients increase their net income and 272 build net worth through the program's income support and financial coaching services. Ninety-one clients have begun skills training through the educational component, and 157 have received employment search assistance through the career development offering.

Melissa is one recent success story. Working as an office manager for her father's company, she always had dreamed of becoming a nurse. She lives near WCC in Houston's Near Northeast neighborhood with her husband, two children and her father.

Learning about WCC's Bridges to Career Opportunities program through an information session, Melissa realized Wesley could help her achieve her dream. One major roadblock: she couldn't afford childcare if she took off work for training. The WCC coordinator connected Melissa with its Early Childhood Education program, which provided free childcare while she attended classes.

She completed six weeks of adult basic education and soft skills classes at WCC to prepare her for medical studies. An excellent student who never missed a single class, she would finish her work early and then help others.

Melissa was planning to attend Houston Community College when WCC, working with United Way, started a new initiative to place its students in a pilot program with Lone Star College and CHI St. Luke's. This three-month program would train her to become a patient care technician (PCT), including training as a certified nursing assistant, EKG technician and phlebotomist. The best news of all: CHI St. Luke's agreed to hire all participants who passed its test.

Excelling in the program, Melissa was one of eight students hired by CHI St. Luke's and the only one without prior health care



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## Scholarships help fund dreams

**HEARTSPRING OFFERS** scholarship fund management as one of its financial services. Over the years, multiple Texas Conference churches and their members have established scholarship funds with Heartspring for the benefit of their church members or community, a specific university or college, or particular vocation.

There are many options. Some churches set up a scholarship committee to decide how much money to award each year and to pick specific recipients. Others have established scholarship endowments and choose to send a percentage of the fund or income directly to a particular college or university, allowing its financial aid office to determine appropriate recipients.

Each year Heartspring also works with the Board of Ordained Ministry to provide scholarships to students from our conference attending seminaries such as Perkins at Southern Methodist University.

Scholarships also provide a venue for individuals to meet their charitable goals. For example, a choir member with a life-long love and appreciation of music sets up a scholarship endowment fund with Heartspring to support college students at his church pursuing degrees in music. A retired teacher established four scholarship funds with Heartspring to help college students in financial need. She experienced the financial burden of college first-hand when she was young and did not want money to be the reason standing in the way of anyone wanting an education.

In 2017, Heartspring helped Texas Conference churches, members and the Board of Ordained Ministry award close to \$120,000 in scholarships to worthy students. In addition to seminary students, these funds offer assistance to students at Texas Southern University, Texas Wesleyan, Southwestern, McMurry, Huston-Tillotson, Wiley College and more.



“This scholarship has helped me to be a better steward of my finances,” says one scholarship recipient. “It has taught me to be prepared for the lean times, and be thankful during times of plenty.”

Often recipients respond with phone calls and thank-you notes offering heart-warming gratitude for the scholarship assistance they received during a particular time of hardship.

Does your church have a scholarship fund in place to help students in need? For more information on establishing a scholarship fund at your church or expanding the uses of an existing one, contact Heartspring at 713-533-3780, 800-521-9617 or [office@heartspringmethodist.org](mailto:office@heartspringmethodist.org). ■

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experience. As testament to her educational achievements, she was offered the highest hourly rate.

“Wesley worked with me to help me achieve my dreams,” says Melissa. “I love my new job and feel like a stronger woman because of this program. I am excited about the opportunity to build a more financially secure future for my family.”

Melissa plans to take full advantage of CHI St. Luke’s employee benefits, including tuition reimbursement to continue her education. Her goal is to take the next step to become a nurse while building her credit and savings so that she may one day purchase a home for her family.

“Wesley is truly changing the face of our community through the success of our outreach programs like the FOC,” says Linda Flores Olson, executive director of WCC.

“Melissa’s story is one of many successes in our history, and we celebrate each and every one of them.”

For more information on Wesley Community Center, visit [www.wesleyhouston.org](http://www.wesleyhouston.org).

**Heartspring grant applications are due by August 31, 2018.**

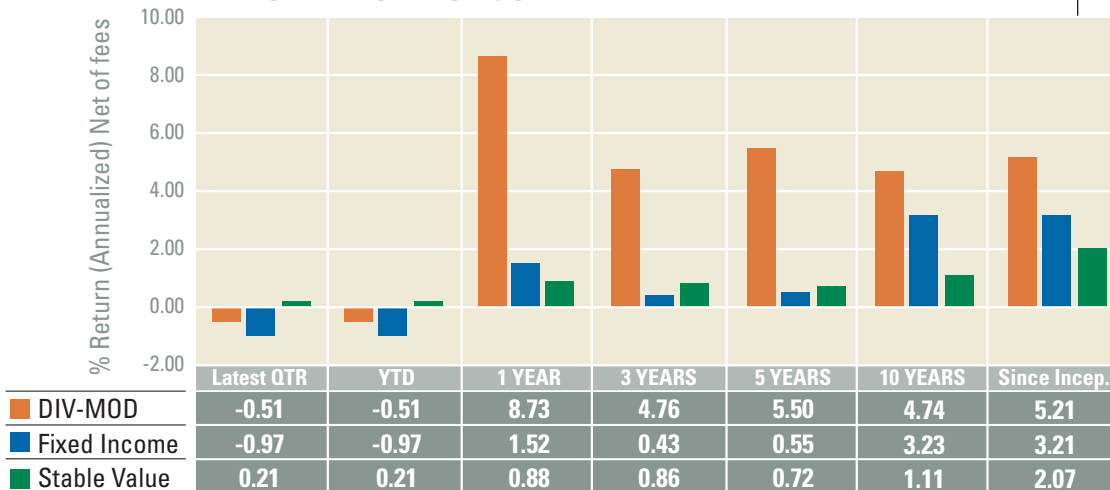
For more information visit [www.heartspringmethodist.org](http://www.heartspringmethodist.org) or contact us at 713-533-3780, 800-521-9617 or [office@heartspringmethodist.org](mailto:office@heartspringmethodist.org). ■

## Financial Corner: Volatility returns in 2018

**THE MARKET** is doing what it does best. What was up at the end of 2017 has climbed, dropped and climbed a bit more all in the span of the first quarter of 2018. Interest rates, geopolitical developments, company earnings, the weather can all affect stock prices, and it is almost impossible to predict these market swings accurately.

This is one of the many reasons we at Heartspring continue to invest in high-quality, long-term investments that offer protection on the downside when the markets drop as well as upside when the market rises. We are here to manage performance and grow your investments for the long haul so that the ministries close to your heart are funded for years to come. ■

### PERFORMANCE - 1ST QUARTER



### One-stop shopping for financial information

For those of you who want more detailed market data, reports on Heartspring fund performance, and other investment and financial news, visit the Financial Corner on our website [www.heartspringmethodist.org/financial-corner](http://www.heartspringmethodist.org/financial-corner). There you'll find our most current performance, as well as other tools and resources, such as market news and commentary from our fund managers, updated monthly.

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I would encourage you to take away two points from this situation:

1. If you don't have an endowment fund, establish one, even if it starts small. The church where my wife and I attend began its endowment fund several years ago with a \$100 gift. Now this fund has grown to several million dollars and gives away several thousand dollars a year to enhance our church's mission. Heartspring can provide the advice and tools you need to get started.
2. If you have an endowment fund, take a fresh look at how you are promoting it among the congregation. Do you communicate regularly that the fund exists, what it does and how to contribute? Heartspring can help you develop both a plan and communication tools to promote your endowment fund.

Throughout my career in pastoral ministry, I have enjoyed observing people who have a great love for their church. The church has been a community of faith, a family of friends, and a sacred place of spiritual guidance and support. As so many have expressed, "I give to my church endowment fund and remember the church in my will because this kind of gift allows me to care for my church forever!" A permanent endowment fund allows folks to care forever, and that is a wonderful thing we can do for our brothers and sisters in faith.

If you want to establish an endowment fund or need help promoting the one you have, please call us today. We have the resources you need to be successful in endowment development and promotion.

Grace and peace,

Rev. C.J. Taylor

## Stronger Together: Heartspring, TMF to join forces

**GREAT NEWS!** The boards of Heartspring Methodist Foundation and Texas Methodist Foundation (TMF) have voted unanimously to join forces. The Texas Conference Board of Trustees also approved this combination with delegates to vote on affirming the resolution at annual conference in May.

Assuming final approval, the merger will become effective Jan. 1 next year.

“Simply put, we will be stronger together,” says Rev. C. J. Taylor, president and CEO of Heartspring. “We firmly believe this union will both expand and deepen the ministries available to you.”

Heartspring and TMF representatives attended the pre-conference meetings in all nine Texas Conference districts to answer any questions from delegates in the last few months in advance of the annual meeting.

“We are excited about the opportunity to better serve our churches, agencies and individuals,” Taylor adds. “As we move through the integration process, nothing will change for our clients through at least the end of 2018. We are eager to know how we can more effectively partner with you to achieve the dreams your church has for God’s Kingdom. Stop by, visit our booth at conference, give us a call or send us your thoughts.”

Details on the merger, including frequently asked questions and a video featuring Bishop Scott Jones and Heartspring and TMF leadership, is available at [www.heartspringmethodist.org](http://www.heartspringmethodist.org). We’ll post new information online as it develops.

### Questions?

Heartspring: Rev. C. J. Taylor or Krystol Wheeler at 800-521-9617 or [office@heartspringmethodist.org](mailto:office@heartspringmethodist.org)

TMF: Tom Locke or Curtis Vick at 800-933-5502 or [tmf@tmf-fdn.org](mailto:tmf@tmf-fdn.org) ■



## TAC 2018: We love all God’s children

The 2018 Texas Annual Conference meets this year May 27–30 at The Woodlands UMC. Heartspring will host a booth in the display area specifically designated for ministries that serve the conference.

If you plan to attend conference this year, be sure to stop by and say hello. We would love to talk with you about how we can help you or your church with planned giving and endowment development or other free educational seminars on stewardship, investments, loans, capital campaigns and more.

Visit the Texas Conference website at [www.txcumc.org](http://www.txcumc.org) for more information.

## Spirit

The Heartspring *Spirit* is published quarterly by Heartspring Methodist Foundation for clients, friends and members of the Texas Conference of the United Methodist Church.

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