



# DAKOTAS UNITED METHODIST FOUNDATION

"Gifts, Legacies, Endowments for Ministry"

**Exec. Dir.: Dr. A. Julian Wigen**  
[jwigen@DakotasUMF.Org](mailto:jwigen@DakotasUMF.Org)

Phone: (605) 996-6552

**Office Mgr: Karon Davis**  
[kdavis@DakotasUMF.Org](mailto:kdavis@DakotasUMF.Org)

P. O. Box 460 Mitchell, SD 57301-0460

Fax: (605) 996-1766

SPRING

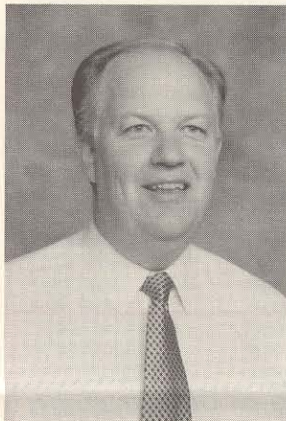
NEWSLETTER

2003

## NEW EXECUTIVE DIRECTOR

Dr. Jim Pedersen, President of the Dakotas United Methodist Foundation, announced following the Foundation's Spring Board Meeting that Dr. Bruce L. Blumer, has accepted the position as Executive Director of the Foundation, effective June 1, 2003.

Dr. Bruce L. Blumer currently is Principal of the Middle School in Mitchell, SD. He is a life long member of the United Methodist Church, with a deep commitment to the mission and ministries of the Dakotas Annual Conference. He brings to the position strong organizational, management and personnel skills, having 18 years of experience in positions from elementary to college level educational institutions. He is a strong motivator and has excellent



oral and written communications and relational skills. Dr. Blumer also brings with him high moral integrity and the ability to work and relate with persons from all cultural and economic levels. He is a fast learner, familiar with computer software programs, aware of the need for innovation and has the management skills that enabling persons to work together in developing and achieve goals and objectives.

Dr. Blumer received a B.S., M.A. and Ed.D from the University of South Dakota, Vermillion, SD. He and his wife's Sharon have two sons, Aaron (senior) and Ian (eighth grader).

## CAPITAL CAMPAIGN RECOMMENDATION GOES TO ANNUAL CONFERENCE

The feasibility study, completed by Paul Strawhecker Inc., was presented to the Foundation Board at their March meeting. Based on that report the Board of Directors made their recommendation to the Leadership Council which in turn has submitted the recommendation to the Annual Conference. The full report giving the focus, findings, significant issues and recommendations can be seen on the Foundation Web Site: [www.DakotasUMF.Org](http://www.DakotasUMF.Org)

The specific Capital Fund Raising recommendations are:

- **Do not embark on an \$18.5 million capital fund raising campaign.**
- **Recommend the AC authorize the formation of a Bishop's Advisory Group/Board to provide counsel and help relating to resources needed to support Conference ministries for the next decade.**
- **Recommend the AC authorize the CFA to consider and potentially approve recommendations from the DUM Foundation Board with regard to future capital fund raising projects and campaigns with early attention to the Camping/Retreat and Retired Minister Health ministries.**
- **Increase the visibility of the Foundation as the lead fundraising arm of the Conference for its ministries.**
- **Develop a Foundation strategy and related staffing for an annual fund raising program, a major and planned giving program as well as the leadership and goals for conducting future capital campaigns and special project fund raising for the Conference ministries.**

Persons interested in the full Feasibility Study Report (65 pages) may contact the Foundation Office.

## FIVE REASONS TO CREATE AN ENDOWMENT

The endowment program of the Dakotas United Methodist Foundation continues to grow because more and more of our friends recognize the benefits of creating their own endowment. Some are establishing them now so they can see the results while others are making such endowment plans through their estate plans.

There are a number of reasons for establishing an endowment. Here are five you may wish to consider:

1. **Durability** — An endowment can provide a perpetual stream of financial support to your chosen ministry while at the same time it is invested to preserve the principal
2. **A Positive Legacy** — When donors attach their name to an endowment they create an enduring legacy that will outlive them and influence succeeding generations.
3. **Perpetuate Annual Gifts** — Many donors see an endowment as a means to underwrite their regular giving to the Foundation or to a Ministry of the Church. For example a \$20,000 endowment could create an annual "gift" of \$1,000 to the United Methodist ministry of your choice.
4. **A Strong Conference Foundation** — The Foundation seeks to raise thousands of dollars for its operation and for the Ministries of the Conference. Annual payouts from endowments relieve some of the pressure and permit the Foundation to plan for the future with confidence.
5. **Personal Satisfaction** — There is something wonderful and fulfilling about doing something good that lasts into the future and makes a difference.

To learn more about the Foundation's Endowment Program contact the Foundation Office — 605-996-6552.

## *A Local Church Endowment, is it the way to go?*

What is a Local Church Endowment? A Local Church Endowment is a special fund (Endowment) established with the Dakotas UM Foundation. Contributions are made to the fund through gifts from local church members that are given to the Foundation and designated to their local church endowment. Funds given to the endowment are invested and the net income each year is distributed to the Local Church the following year.

- ▶ Such an endowment allows local church members to make gifts both small and large to a fund that will over the years provide ongoing support to the local church for ministry.
- ▶ Such an endowment allows individual members to make memorial gifts in memory of loved ones to a fund that will perpetually support the ministry of their local church.
- ▶ Such an endowment allows church members to make gifts to honor those who have given to the church their dedication and love.
- ▶ Such an endowment is a way for local church members to say with confidence and commitment that we believe our local church will continue its ministry far into the future.

*You can*

### **CREATE A LEGACY**

*by leaving a bequest or establishing an endowment with the Foundation to benefit a Ministry of the Dakotas Conference or perhaps your Local Church. Each endowment ensures that future generations will hear and witness the love of Christ in their lives.*

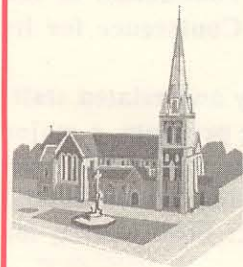
*For information call  
Dr. A. Julian Wigen  
(605) 996-6552.*

*Dear United Methodist Friends,*

*I have enjoyed greatly the past eleven years as Director of the Dakotas United Methodist Foundation. I want to welcome Dr. Bruce Blumer as he takes over June 1st and wish him the very best.*

*Lois and I have purchased a home in Rapid City and we look forward to retirement in the Hills. We invite you to visit us when you are in the Hills.*

*It has been a rewarding experience working with the Pastors and wonderful lay people of our Conference. My thanks and appreciation to them all, for the giving of time and resources in support of the Ministries of the conference. I also want to thank the Foundation Board members for their faithful dedication and guidance over the years. A special thanks to Karon Davis, Office Manager, and to the staff at the Conference Center for their friendship and support.*  
*A. Julian Wigen*



## IN REMEMBRANCE OF

A gift in memory of a loved one or in honor of someone is a fitting way to recognize the contributions of others in our lives.

The Foundation provides this opportunity for you to say thanks for what someone has meant to you.

### In Memory of:

Rev. Otto Gehring  
Rev. Otto Gehring  
Rev. Otto Gehring  
Rev. Elmer Sprunk  
Keith J. Taylor  
Marvin Christman  
Rev. Robert Olson  
Rev. Elmer Sprunk  
Alma Rambough

### Given By:

Jim & Mavis Pomeroy  
Roland & Verlaine Walkes  
Eldon & Donna Reich  
Eldon & Donna Reich  
Kenneth & Kiame Ketel  
Elda Christman  
Dick & Pat Unkenholz  
Dick & Pat Unkenholz  
Bev & Don Enger  
Susan & Bruce Larson  
Jan & George McCarthy  
Stanton & Myra Rambough  
Gloria Grandy  
Karen Krogstad

### Purpose:

Pensions  
Pensions  
Pensions  
Pensions  
Undesignated  
Undesignated  
Pensions  
Pensions  
Pomeroy Camp Endow.

Lenora Cushing  
Lenora Cushing  
Lenora Cushing - Birthday  
recognition  
Fred Werremeyer,  
Raymond Kundrat  
Sharon Clow  
Richard Teichmann  
Rev. Robert Olson

David & Regina Cushing

R. & L. Cushing Endow.  
R. & L. Cushing Endow.  
R. & L. Cushing Endow.

Jesse D & Jessie E.  
Vincent

Day Werremeyer  
Joan Teichmann  
Eddy County Ministerial  
Association, ND

Dickinson UMC Endow.  
Pomeroy Camp Endow.  
Wesley Acres Camp End.

Lenora Cushing  
Garnett & Erma Moritz  
Duane Monteith  
Rev. Jerry Wickre  
Gladys Muxen  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Keith Taylor  
Gerald Gary Sleep  
Arthur Krueger  
Arthur Krueger

Velma Vincent  
Rev. Ralph Cushing  
Lois Zander  
Mrs. Carol Monteith  
Todd & Terry Perman  
Duane Muxen  
James & Eileen Persons  
Faye Stohr  
Dick & Cheryl Boyd  
Bonnie Carlson  
Gene & Barb Kroger  
Dennis & Roberta Gellhaus  
Dwayne & Fern Gellhaus  
Lon & Marva Gellhaus  
Gail & Bud Brock  
Dick & Donna Fisher  
Betty Taylor  
Mildred Sleep  
Warren & Lillian Kuhler  
University of St. Thomas,  
St. Paul, MN

DUMF Permanent Endow.  
R. & L. Cushing Endow.  
Pensions  
Undesignated  
St. Mountain Ret. Center  
Undesignated  
Undesignated  
Undesignated  
Undesignated  
Undesignated  
Undesignated  
Undesignated  
Undesignated  
Undesignated  
Undesignated  
Undesignated  
St. Mountain Ret. Center  
Dakota Wesleyan Univ.

Roland Nies  
Arthur Krueger  
Alice Hartsell  
Arthur Krueger

Norm Neumann  
Arthur Krueger Family  
Geneva Turbes  
Julian & Lois Wigen

Dakota Wesleyan Univ.  
Pensions  
Dakota Wesleyan Univ.  
Undesignated  
DUMF Operational End.

### In Honor of:

Donald & Audrey Neff  
50th Anniversary  
Sarah Baker  
Rev. Jim Pomeroy

### Given By:

Harold & Lois Neff  
Arthur UM Church  
Mary Ann Hagen

### Purpose:

Martha Neff Endow.  
Dakotas Camp Endow.  
Pomeroy Camp Endow.

## NURSING SCHOLARSHIP ENDOWMENT ESTABLISHED

A Scholarship Endowment for nurses education to be known as the **William & Frances Hopf Memorial Endowment** has been established by Marlene Petrik of Wagner, SD. The funds are to be used to provide scholarships for nurses education with preference to students from the Wagner/ Armour or Freeman/Marion area. In making this endowment gift, Marlene Petrik explained that she, being a former nurse, has always felt strongly about the need to educate and train qualified nurses. We are thankful for her commitment and dedication to this special ministry.

## YOUR HELP NEEDED!

A very special gift of \$1,000 was received last year from the Flandreau Indian School Chaplaincy Program. The gift was given by those who wished to honor Anthony (Tony) Firman for his faithful, dedicated and loving service to the Flandreau Indian School.

Even though the amount does not meet the minimum (\$5,000) to establish a Named Endowment, the Board voted to receive it and establish it as the **Anthony (Tony) & Denise Firman Endowment — for Flandreau Indian School Chaplaincy Program.**

If you know of the fine work that Tony has done over the years and/or if you believe in the mission and ministry of the Flandreau Indian School Chaplaincy Program, we ask that you help us reach the goal of \$5,000 for this endowment. Your gifts large or small will be greatly appreciated. Just mark your gift to go to the Tony Firman endowment.



Art & Beulah  
Krueger

**Art Krueger**, former advocate and field representative for the Foundation passed away February 6, 2003. Art served during the 60's and early 70's as a Fieldman calling on people across the Conference, raising funds for the Ministries of the Annual Conference. At that time the Foundation had two distinct programs: the Current Fund Program and the Wills Program. Mr. Warren Kuhler was Director of the Current Fund Program and Art worked with him. The Director of the Wills Program was Rev. Dr. Byron Davis. Art Krueger will be remembered for his contribution to the growth and development of the ministry of the Foundation. Our prayers and best wishes to Beulah who continues to live in Yankton, SD.

## FOUNDATION BOARD ELECTS DIRECTORS

At the Spring meeting of the Foundation Board of Directors, Rev. Gary Geiman—Washburn, ND, Mr. Jim Pedersen—Brookings, SD and Rev. Jim Patrick—Rapid City, were chosen to serve as the Class of 2007 on the Board. These elected persons will be presented to the Corporate Session at Annual Conference for confirmation.

The members of Annual Conference elected by their local church are also members of the Corporate Session of the Dakotas United Methodist Foundation. The Corporate Session will be held on Friday, June 6th, at Annual Conference in Fargo.

## SENATE APPROVES CARE ACT

On April 9, 2003 the Senate approved the CARE Act by a vote of 95-5. The House is expected to introduce companion legislation in the next couple of weeks. This is a victory for Charities across the country.

The CARE Act of 2003 amends the Internal Revenue Code with respect to charitable giving, charitable organizations and social services. In regard to giving, it does a couple of things: (1) It allows a deduction for a portion of charitable contributions to individuals who do not itemize; and (2) it allows tax-free distributions from individual retirement accounts for charitable purposes.

This will be very helpful to donors seeking to support charities, but who do not itemize and to charities working with donors through planned gifts involving individual retirement plans.

**Return To: Dakotas United Methodist Foundation, P.O. Box 460, Mitchell, SD 57301-0460**

Enclosed is my/our Gift in the amount of \$ \_\_\_\_\_

- Undesignated (to be used where needed).  
 Permanent Endowment Fund.  
 Operational Endowment Fund.  
 For: \_\_\_\_\_

(List Ministry: Camps, DWU, etc.)

**Please send me without cost information on:**

- How to include the Church in my will.  
 How to make a Charitable Gift and retain a life income benefit.  
 How to establish a "Named Endowment" to benefit a particular United Methodist Ministry.

Name: \_\_\_\_\_

Address: \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

*Return Service Requested*

Mitchell, SD 57301-0460  
P.O. Box 460

1331 West University Avenue  
**Dakotas United Methodist Foundation**



Neither the author, the publisher, nor this organization is engaged in rendering legal or tax advisory service. For advice and assistance in specific cases, the services of an attorney or other professional advisor should be obtained. The purpose of this publication is to provide accurate and authoritative information of a general character only. State laws govern wills, trusts and charitable gifts made in a contractual agreement; thus advice from legal counsel should be sought when considering these types of contracts.

Nonprofit Organization  
Bulk Rate U.S. Postage  
Paid  
Mitchell, SD 57301-0460  
Permit No. 54