



Circuit Rider Dispatch



Holston Conference of the United Methodist Church Foundation, Inc.



In my book there are over 100 million reasons to be grateful as 2014 is now history. Despite another year of doom and gloom headlines (Ebola, Ukraine, airplane crashes, etc.) the Foundation enjoyed a wonderful year of growth adding 79 new accounts and ending the year with a new all-time record high of \$101,812,158 of assets under management. These results did not come about by themselves, but instead reflect oversight of a supportive board of directors, a dedicated staff, and the trust and generosity of many donors, churches, and ministries across the conference.

Investment offerings and excellent performance, especially over the long-term, drive our reputation and opportunities for new accounts each year. Our **Balanced Growth Fund** was up **7.76%**, **Equity Growth Fund** up **10.19%**, **Intermediate Income Fund** up **3.42%** and **Short-Term Income Fund** up **.59%** in 2014. The Balanced Growth Fund has a trailing average annual return of 6.81% for the past 10 years (benchmark 6.62%) and this track record helps explain why this option is by far the most popular option for endowments and other long-term oriented funds. While record low rates still exist in CD's and other similar investments, we certainly offer attractive options for churches and other ministries to consider.

About 40% of all funds in the Foundation belong to local churches, 5% to districts, 13% to the conference, 9% institutions and 33% are trusts/endowments/legacies created by donors that benefit the churches and ministries selected by the donors. Several of these funds offer grants and scholarships each year.



We all look forward to the challenges and opportunities to build on our past success. God has blessed us to be a blessing to others. Call on us if we can help you examine the possibilities!

*Roger Redding
Executive Director*



SAVVY LIVING

How to Claim the Retirement Saver's Tax Credit

A coworker was recently telling me about a tax credit she got last year for simply contributing to our company's 401(k) plan. What can you tell me about this and who is eligible? [Read More](#)

PERSONAL PLANNER

Trusts to Protect Children

Trusts are an excellent way to provide for the support and care of children while protecting them. Two important reasons to create a trust are to care for minor children or [Read More](#)

YOUR PLAN

Evelyn Caldwell

Researchers have found that the word "love" appears in the Bible... [Read More](#)

WASHINGTON NEWS

IRS Free Tax Services

In the IRS Guide to Free Tax Services, there is a comprehensive description of available services for taxpayers. These services may be quite helpful for taxpayers as they prepare to file their 2014 returns. [Read More](#)

FINANCES

Stocks - Sonic's Results Boom Over Competitors [Read More](#)

Bonds - Treasuries Rise on Jobs Report [Read More](#)

CDs and Mortgages - Interest Rates Fall to Start the Year [Read More](#)



You may have heard about planned giving, but are not familiar with the benefits.

A planned gift is really quite easy—it involves some planning that helps both you and your church or favorite ministry. The Holston Conference Foundation can help you achieve your charitable goals while providing for your family.

The planning tools on our website can help you create a legacy in your will or trust, increase lifetime income for you and your spouse or pass on property to your heirs through a charitable plan.

To learn more about the benefits of making a planned gift, contact us at 865-690-8124 or visit www.holstonlegacy.org.

The greatest use of a life is to spend it on something that will outlast it.
William James

Planned giving is an excellent means to create a lasting legacy that benefits others for years to come. With a variety of options for one to consider, a planned gift can provide lifetime income to a loved one and assist the giver in certain tax burdens.

As a reminder, Roger Redding and I are available for ***FREE*** consultations on the phone, via email or even in person as we frequently travel up and down the Holston Conference. We greatly enjoy meeting with many different types of donors and committees answering questions, providing important documents and literature as well as conducting workshops related to the Foundation's investment or planned giving services.

It is a joy to serve those who need assistance in making very important decisions about their estate with a planned gift. I consider it an honor to sit down with individuals as they deliberate how to bless others in their giving as together we discuss their hopes, dreams, fears and vision of what they can accomplish through a legacy gift.

If this is something that interests you please let me know as I look forward to what 2015 brings to all of us who anticipate impacting the kingdom through the good stewardship of what had been entrusted to us.



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