



## Circuit Rider Dispatch



Holston Conference of the United Methodist Church Foundation, Inc.

Each year *Giving USA* issues a report on generosity in America. The 2016 report was recently released and confirmed that for the second year in a row American philanthropy set a new record high with charitable giving totaling \$373.25 billion...that's billion with a "B" in 2015. While terrorism, zika, and politics may dominate the headlines, the American spirit and generosity continue to grow. People really do want to make a difference. Certainly more people give than vote.

It may or may not surprise you, but giving to religion continues to be the single largest recipient area of giving by Americans at \$119.3 billion or at 32% of all charitable giving last year that was followed by education at 15%; human services 12%; Foundations 11%; health 8%, public-society benefit 7%; arts/culture 5%; international affairs 4%; and environment/animals 3%. Overall giving to religion was up 2.6% in 2015.

So where did these gifts come from? The answer to this is always the same...PEOPLE! 16% of all giving came from foundations, 5% came from corporations, but individuals gave nearly 71% of all charitable gifts...plus another 9% from bequests/wills! Question....did your church or ministry receive 9% of its giving last year from estates? If not, then you better call Paul!

While headlines may be full of doom and gloom, 2016 is actually a great year of growth and generosity in the Holston Conference Foundation. At the end of July, total assets under management surpassed **\$109 million**. All of our [investment return options](#) are positive YTD with the **Balanced Growth Fund + 6.47%**; **Equity Growth Fund + 7.21**; **Intermediate Income Fund + 4.70**; and **Short-Term Income Fund + 2.04**.

Holston Conference Foundation hits a



with \$109,000,000.00  
in assets under management!

Positive investment returns over the long term certainly help us attract new funds from churches and ministries, but much of our growth starts with individuals who contact us seeking options, samples, brochures, etc., or simply to talk about a potential gift or bequest. We are honored by the confidential conversations. Many times our primary role is to listen, but frequently we can provide valuable feedback based on experience or even assist in drafting a document that makes sure there is a clear plan in place that stewards their values, clarifies their intent and also addresses unanticipated changes, like a church closure and an alternate use. We specialize in scholarship and endowment creation.

Just know that we are at your service! [Contact us](#) and we will listen!

- Roger Redding



SAVVY LIVING

### How to Find Financial Assistance for Elderly Parents

Where can I go to locate financial assistance programs for seniors? I have been helping support my 70-year-old mother the past couple years and really can't afford to do it any longer. [Read](#)

[More](#)

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## PERSONAL PLANNER

### **Planning with a Serious Illness**

If at some point in life you have a serious illness, there are a number of planning options that should be considered. With a serious illness, there are emotional, physical and [Read More](#)

## YOUR PLAN

### **Evelyn Caldwell**

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

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## WASHINGTON NEWS

### **Sen. Schumer Urges Passage of Olympic Tax Benefit**

Sen. Chuck Schumer (D-NY) and Sen. John Thune (R-SD) co-sponsored the United States Appreciation for Olympians and Paralympians (USA Olympians and Paralympians) Act. [Read More](#)

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## FINANCES

**Stocks** - Tesla's Earnings Disappoint [Read More](#)

**Bonds** - Strong Jobs Report Sends Yields Higher [Read More](#)

**CDs and Mortgages** - Mortgage Rates Fall Near 2016 Low [Read More](#)

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Friend,

We have two things in common. First, we have a date set before us when we will transfer our earthly membership to an eternal destination. Secondly, we have a last will & testament. If you did not take the time in this life to specify your wishes then the state of Tennessee, or Virginia, has done it for you.

The Holston Conference Foundation serves individuals by helping them with these two issues. (No, we cannot help you defer the date you meet your Maker!) We do, however, address end-of-life issues through our popular workshop, Provide & Protect. In addition to the workshop we host at local churches when invited, we also provide a *Personal Information Record Book* to assist your loved ones in settling your affairs. Please let me know if you would like a copy or copies and I will gladly send it to you.

On that note, a Foundation board member recently sent me the following web link concerning writing your own obituary. I highly recommend that you watch it and embrace the concept of penning the written legacy of your life.

<http://www.wsj.com/video/writing-coach-helps-seniors-pen-their-own-obits/87708AD1-A3AB-412D-8474-855A2F7F9B38.html>

Finally if you have a charitable interest in leaving a legacy to your church or favorite ministry please [contact us](#). We can assist you with a personalized illustration for a charitable trust or suggest codicil wording for your will.

Regards,  
Paul Bowman  
Director of Gift Planning

