



Circuit Rider Dispatch



Holston Conference of the United Methodist Church Foundation, Inc.

I INTEND TO LIVE FOREVER, OR DIE TRYING!

Groucho Marx once stated what many of us seem to believe...we are going to live forever. At least it seems when you consider that the vast majority of Americans have not taken the time to create a self-directed will. Thus they are letting the state decide their will. What's even worse, many do not take the time to let their loved ones know where information about their finances or important records can be found. Be prepared by completing the [Personal Information Record Book](#). Click [here](#) to have a copy sent to you.



Death, whether sudden or expected, brings confusion, anxiety and numerous complex and immediate choices to be considered by those the deceased leave behind. Following a checklist of what to do when your loved one passes away can simplify the process and assure you that you do not miss important steps in settling someone's affairs. Click here for the new [Checklist for the Passing of a Loved One](#) whether you are getting your own affairs in order or dealing with a loved one who passes away.

Both resources will give you (and those you love) a peace of mind that should be enjoyed during a time of grieving the passing and celebrating a life well-lived. The Holston Conference Foundation is pleased to offer these and many other helpful resources available upon request.



PERSONAL PLANNER

Married Couples and Property

Mary was a surviving spouse. She and her first spouse, Ryan owned a lovely home and placed it into joint tenancy with right of survivorship. After Ryan passed away, Mary met [Read More](#)

SAVVY LIVING

Wandering Solutions for Alzheimer's Caregivers

My mother, who lives with me, has Alzheimer's disease and I worry about her wandering away. What tips can you recommend to help me protect her? [Read More](#)

YOUR PLAN

Henrietta Pugh

The way Henrietta Pugh lived her life was a true testament to her positive attitude, selflessness... [Read More](#)

WASHINGTON NEWS

Congress Votes and Departs to Campaign

Because the House and Senate have not yet passed a budget for the fiscal year starting on October 1, it was necessary to pass a continuing resolution. The House passed the resolution by a vote of 319 to 108 on September 17. The Senate followed on September... [Read More](#)

FINANCES

Stocks - FedEx Reports Impressive Earnings [Read More](#)

Bonds - Spanish Treasury Yields and Tensions Fall [Read More](#)

CDs and Mortgages - Interest Rates Rise [Read More](#)

PERFORMANCE UPDATE

Stocks had their best month since February as the markets closed at the end of August with the S&P 500 exceeding 2,000 for the first time EVER. Even bonds were up for the month. Perception around the world seems to be that the U.S. economy continues to offer a much better bet than Europe and Japan or emerging markets. YTD the Foundation's Balanced Growth Fund is up 6.8% (and has trailing 10-year average annual return of 7.23%). Our Short-Term Income Fund is up .55%, the Intermediate Income Fund is up 3.2%, and the Equity Growth Fund is up 8.6%. Churches and ministries continue to open new accounts and add funds to existing accounts. Total assets under management have grown to \$97.7 million.

While we cannot predict short-term directions in the market, we continue to suggest a diversified long-term strategy for long-term oriented accounts using the Balanced Growth Fund and the modest yet safe return of the Short-Term Income Fund for shorter-term oriented accounts.

New accounts may be dollar-cost averaged over time or even mixed or matched into any of our offerings. Call us and we will be glad to visit your church or committee to explore the options.



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