



Circuit Rider Dispatch



Holston Conference of the United Methodist Church Foundation, Inc.

As 2016 grows closer to an end, we pause to reflect on the journey. While this has been a very complicated year, complete with a General Conference, national election, drought, tornadoes, and wildfires...we have kept our focus on serving churches, people and ministries and have much good to show for the efforts. Assets under management continue to grow and we hope to set a new record high at year end. We feel blessed and hope that each of you will have a chance to pause during this Christmas Season to experience the joy and hope that is **THE REASON FOR THE SEASON!**

In November, the financial markets seemed to overcome election doubts and fears and roared ahead. The end of November saw the **Balanced Growth Fund** up **6.6%**; the **Intermediate Income Fund** up **2.4%**; **Short-Term Income Fund** up **1.2%**; and the **Equity Growth Fund** up **8.8%**.

December has been positive thus far and we are looking forward to closing the year on a positive note.



Paul and I have been busy assisting churches with existing accounts and in helping others explore their options. We celebrate and welcome new investment accounts being established by **St. Mark's UMC in Knoxville**, **Lookout Mountain UMC in Chattanooga**, **Soddy UMC**, and **Ottway UMC in Greeneville** to just name a few. **Soddy UMC** was blessed with a very generous estate gift from Earl & Almeda Frazier and that led to a discussion about options and investments and a well-attended meeting with the Foundation. A similar story and program took place at **Ottway UMC**. After careful review, both churches decided to do things differently than in the past and we look forward to serving these churches for years to come. Paul visited **Ooltewah UMC** recently and is assisting them to launch their new Endowment and Planned Giving Ministry Program in 2017. The office staff also assisted donors with processing stock gifts for **Shades of Grace** in Kingsport, **Wesley Memorial UMC Chattanooga**; **First Pulaski UMC**, and **Fountain City UMC in Knoxville**. In each case 100% of the proceeds were sent to the church and our role is to accept and liquidate the shares per donor instructions.

While 2016 is winding down, we are not done yet. If we can assist you with a year-end stock gift or examine options and ideas for next year, please contact us and let us know how we can assist.

Roger Redding
Executive Director



SAVVY LIVING

[Locating Lost Life Insurance Policies](#)

When my mom passed away we thought she had a life insurance policy, but we have no idea how to track it down. Do you know of any resources that might help?

[Read More](#)

PERSONAL PLANNER

[Living Trust - Life and Death Decisions](#)

In discussing your living trust with your attorney, there are several very important decisions for you to consider. Some of your decisions affect the management of property during life, and others will determine how your successor trustee manages your... [Read More](#)

YOUR PLAN

Edith Leming Skinrod

EDITH LEMING SKINROOD had the looks of a movie star and the disposition of an angel. [Read More](#)

WASHINGTON NEWS

IRS Advice on Phishing Scams

In IR-2016-160 the IRS explained the best taxpayer defenses against phishing scams. During the 2016 filing season, the IRS reported a 400% increase in malware or phishing. [Read More](#)

FINANCES

Stocks - Dave & Buster's Enjoys Increased Sales [Read More](#)

Bonds - Treasury Yields Rise Ahead of Fed Meeting [Read More](#)

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

Business as Usual?

Most churches across the Holston Conference have short-term and long-term funds invested in CDs. With the average One Year CD at .31% ([Bankrate.com](#)) this approach does not produce enough yield to effectively carryout the mission of the church. Inflation alone robs any opportunity to have an impact for the kingdom.

There is an alternative.

We invite you to consider meeting with Foundation staff who will share with your finance committee the options available through Foundation funds. We travel around the conference having these often difficult conversations with church leaders.

Before your church "rolls over" another CD give us a call at 865-690-8124 or [click here](#) to send an email.

We are here to serve the local church and enjoy doing so.



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