



KANSAS METHODIST FOUNDATION

Ministry Grows Here

2022 IMPACT REPORT



Message from Our President & CEO

In 2022, KMF continued growing our ministry with Methodist families, churches, and organizations. We are called into this unique ministry of stewardship and generosity so that together we make a lasting difference in the name of Jesus Christ. Thank you for joining us on this shared journey.

At KMF, we believe God is calling the Church and its people to **dream dreams and see visions, knowing that we have an abundance of resources poised for ministry**. When we activate our treasures with generous hearts, God will grow us and use us to make disciples, change lives, and transform communities throughout Kansas.

A key part of the KMF ministry is **Legacy Giving**. What impact could you make for the sake of Jesus if you leveraged your estate to make a gift of a lifetime? What would it look like for you to **tithe** your estate? Or perhaps even more?

Did you know that if every Methodist in Kansas gave 10% of their estate, no matter the amount we have been entrusted by God, it is forecasted that together we would create a legacy of more than \$1.5 billion in distributions between 2021 and 2040. Wow! This legacy pool would produce significant annual distribution to make a profound impact because of our faith. Friends, God has already entrusted us with all that we need to be the church God is calling us to be.

So, I ask, what dreams for the Church could we make possible through our generosity? Below are the four things I dream about.

- **Seminary Scholarships:** I dream of an endowment to provide seminary scholarships so that every person called by God into local church ministry would say, "Yes!" They would commit their lives to this work and not be burdened by seminary debt.
- **Financially Healthy Churches:** I dream of a financial leadership program to equip and sustain financially healthy pastors and churches all across Kansas. What if we had strong fiduciary practices so that our congregations had the resources to do the ministry God is calling us to do? God did not call us into being to just survive but rather to thrive!
- **Discipleship Grants:** KMF has developed a program to grant matching funds for local churches, agencies, and organizations to help grow disciples of Jesus Christ in the areas of Children & Youth, Ministry & Outreach, Leadership Development, and Justice Ministries. Throughout Kansas, the Holy Spirit is moving and calling people to create new ways of serving and growing disciples. I dream of greater resources to make a difference.
- **Leave a Lasting Legacy:** Finally, I dream of every Methodist having a quality estate plan to care for their families and to give in order make a difference in the future of the church and community. We would be honored to serve you.

What are your dreams?

I believe God is with us and provides all we need to do the ministry to which we are called. Thank you for being a partner with us and for what God is doing together through us. May the Lord bless you, lead you, and strengthen you for faithful service in the coming year.

Sincerely,
Rev. Dr. Dustin D. Petz



Helping Grow Estate Planning Services

Make a Plan, Create a Legacy

Some people cringe when they hear the words “estate planning.” Some people have misconceptions about the process. Some people just procrastinate. And it’s easy to delay creating a Will or Trust, naming people to act on our behalf should we become incapacitated during life, and making other end-of-life plans.

We’re busy. Other tasks seem more important in the here and now. We don’t want to think about incapacity, death, and dying. It doesn’t sound fun.

But what happens when the inevitable happens to you? And what if the unexpected occurs?

Since its founding, the Kansas Methodist Foundation has been assisting faithful Methodists and their families with making plans and creating legacies. Estate planning is a key component of our ministry.

Grounded in the belief that God is the owner and we are the stewards of God’s many gifts, KMF staff have helped hundreds of families put their houses in order while also including a charitable legacy.

Starting in 1991, the KMF began contracting with John Griffin, Jr., an estate planning attorney who works with families to design their total estate plans. We are pleased to offer John’s services via Stewardship Counseling, LLC, at no cost to our partnering families.

We also know there are many more families who need to create plans than we can serve via John Griffin alone. As we seek to broaden the reach of our ministry, we have created an estate planning guide and built a list of attorneys in Kansas who can serve our many Methodists. Using this process, we hope to assist more people in the estate planning and legacy building process.

In 2022, KMF served many families, including Marshall and Janice Stanton of Salina, KS and Adam and Ashley Barlow-Thompson of Wichita, KS. We are grateful for these two families and the opportunity to share their respective stories.



HELP FOR THE FUTURE WITH JOHN GRIFFIN & KMF

It is estimated that 60% of Americans have no estate plan. Whether you need to create your plan for the first time or update the documents previously created, we can help.

The Kansas Methodist Foundation offers FREE estate planning services. One service is through a partnership with John Griffin, Esq. of Stewardship Counseling, LLC. John helps you create the draft plan to take to your chosen attorney for formalization. This service offers a comprehensive and a guided step-by-step process in planning your estate.

KMF offers this service by APPOINTMENT ONLY.
Contact us at info@kansasmethodistfoundation.org or 620-664-9623 to schedule a meeting!

Growing Estate Plans

The Stanton's

A Legacy of Learning, Teaching, and Leading

Mention the Stanton name among Kansas United Methodists and you are sure to make a connection. For decades, the Stanton family has faithfully served across Kansas.

Both native Kansans, Marshall and Janice are familiar with all regions of the state. Marshall was born in Satanta and raised in Plains while Janice was born in Topeka and raised in Wichita.

Marshall and Janice were children during the Great Depression. Marshall grew up on a farm and learned about farming and all the equipment required to carry out its operation. Above all, he learned about working from dawn to dusk.

While Janice didn't grow up on a farm, she was no stranger to work. Coming from a family of modest means required her to work part-time in high school and to work all through college.

Significant life lessons stemmed from those days of hard work and little resources. They learned to both solve problems and to measure work not by the clock but by the task.

After high school, both Marshall and Janice pursued advanced education, which led to them meeting at Friends University. In 1956, the two married while Marshall was a senior and Janice was a junior. Both graduated from Friends with honors and then moved to Wilmore, Kentucky, where Marshall enrolled in Asbury Theological Seminary.

Following seminary and another degree from Princeton Theological Seminary in 1961, the Stanton's moved back to Kansas where Marshall started pastoral ministry by serving the Jewell/Randall parish in North Central Kansas. While at that appointment, Eric (1962) and Kirsten (1966) were born. Marshall also started his involvement with Conference-wide tasks, the first of which was organizing a study tour for adults to Washington, D.C. and New York City.

The Stanton family moved to Salina in 1966 to serve Trinity United Methodist Church, a church then only four years old. The congregation's membership was dominated by young and middle-aged adults. Only two couples were of retirement age in 1966. Nathan was born in 1969, and the Stanton's moved to a thousand-member church at Colby in 1971.



After seven years, Marshall was appointed as District Superintendent of the Hutchinson District, during which time he started service on the Kansas Wesleyan Board of Trustees. During those years, Janice returned to teaching English at the junior high level.

In February 1984, Marshall was elected President of Kansas Wesleyan University where he served for 18 ½ years, setting a service record for presidents at KWU. While Janice was active at the university as the spouse of the president, she also taught English at the high school level.

All three Stanton children earned college degrees. Nathan gained two master's degrees, one in Theology and one in Theater.

The great themes guiding Marshall and Janice's life have been Christian commitment; stewardship of all of life, including time, talent and treasure; emotional stability during all circumstances; making things work, ranging from institutions and organizations to automobiles and model airplanes; and learning to be comfortable with difficult situations while working to improve them.

Above all, the Holy Spirit has guided the Stanton's into greater service opportunities than they could have imagined, leading them through great difficulties while also providing endless joy and satisfaction.

The Stanton's have dedicated their lives to faith, family, and education. Their legacy and generosity amplify all three of those areas. Included in their estate plans, established through the estate planning process with KMF, are provisions for the Marshall & Janice Stanton Legacy Fund, which will support college and seminary scholarships. Truly, the life Marshall and Janice have lived and the plans they have made create a legacy of learning, teaching, and leading.



"We were surprised when we contacted the Foundation to learn that we could use an attorney to help us design our wills and trust plans as a gift from the Foundation. We completed wills and trusts in 2022 and were delighted with the consultation that included three 1 ½ hour Zoom conversations, one of which included our adult children. We are grateful for the KMF's assistance that was previously unknown to us." -Marshall Stanton

Growing Estate Plans

Adam & Ashley Barlow-Thompson

Faith-driven & Future-focused

Need reassurance that the future of the United Methodist Church is both promising and bright? Meet Adam and Ashley Barlow-Thompson.

Both Adam and Ashley have deep roots in the United Methodist Church. Adam is from Salina, where he was active with the church and graduated from Salina South High School. After high school, he attended Southwestern College with plans to go to seminary.



Ashley is from Wisconsin and went to college in Illinois at North Central College, an institution affiliated with the United Methodist Church. Both Adam and Ashley attended Garrett-Evangelical Theological Seminary, which is where they met.

Adam is an ordained elder. While in seminary, Adam envisioned an outreach ministry to rebuild struggling communities. He went on to co-found The Neighboring Movement in Wichita and serves as its director. Adam is passionate about building relationships, discovering strengths, and developing communities.

"KMF made planning for our family's future feel more like a part of our life's mission and faithfulness instead of a task to be done. Because of the incredible relationship their staff built with us, their willingness to meet our needs, the awesome information they shared, and the affirmation they gave us along the way, we feel empowered to plan and live in ways that match our hopes for the future for our kiddo and for the organizations we are part of. Now our end-of-life decisions and planned giving matches our faith, our most important relationships, and our values. We are so grateful!" - Ashley Barlow-Thompson

Ashley is also an ordained clergy person and serves as both a deacon and Director of Outreach at Calvary UMC. She is passionate about supporting ministry in the areas of missions, outreach, social justice, hospitality, and faith formation.



Adam and Ashley are parents to Prescott, who they adopted as a baby. He's now 10 years old and in 5th grade. In their free time, they enjoy camping, spending time together as a family, playing folk music, and socializing with friends and neighbors.

Adam and Ashley used the KMF's estate planning guide and assistance from KMF staff to create a revocable living trust. Part of their plan includes provisions for the Barlow-Thompson Family Fund, which will support camping ministry, higher education, seminary, and another non-profit focused on justice ministry.

Though young, the Barlow-Thompson family is prepared for whatever may come. Regardless of what happens to Adam and Ashley, Prescott will be cared for and ministries close to their heart will benefit from their generosity.



With two examples like this, we can have faith in a bright future for the UMC in Kansas!

Local Church Endowment

Tonganoxie United Methodist Church

“For everything there is a season and a time for every matter under heaven.” (Ecclesiastes 3:1)

Such is the journey of local church ministry. To remain impactful, the practices of ministry must adapt and respond.

The Endowment of Tonganoxie United Methodist Church was born by generous gifts from a few long-time church member families in the 1980s. While it served TUMC well for many years, a new season was upon the church to broaden the scope of the endowment and to invite new gifts.



In 2022, the Tonganoxie UMC began working with the Kansas Methodist Foundation to consider options of restructuring and rethinking its endowment program.

The entire new relationship began with the Kansas Methodist Foundation's investment services, providing competitive returns, minimum fees, and investments in alignment with the values of the Church. However, Tonganoxie UMC came to discover that KMF brought more value to the relationship than was expected. Mark Gepner, chair of the newly organized Permanent Endowment Committee, said, “We just never expected that relationship to include so much more than an investment partner.”



KMF worked with the committee to broaden the vision for possible purposes of the endowment, confirm the commitment to hold to the intent of pastor donors, and create a process to engage congregation members to remember the church in their estate planning.

“KMF planted the seed that our Endowment doesn’t have to be what it always has been. This may seem like a small thing, but empowering the congregation to dream bigger was potent and contagious.”

-Mark Gepner

Tonganoxie United Methodist Church



In the fall of 2022, Rev. Dr. Dustin Petz joined in the series of sermons about stewardship that Pastor Matthew Wilke was preaching in October. The coordination of preaching about how to make an impact in ministry through generosity was fitting as part of the series. The sermon spoke to the impact of giving for annual support, while also pointing to leaving a lasting legacy for the future of Tonganoxie UMC.

As part of that Legacy Sunday, Petz presented a training about the impact of our living giving, and the importance of creating an estate plan, so that as disciples of Jesus we can steward well the resources entrusted to us by God.

It was an impactful year, laying the foundation for a vibrant future for the church. With vision, a trustworthy process, and making a heart-felt ask, we can make a lasting impact on the Church, as we live out our discipleship in the community.

If it is a new season with your church, consider connecting with the KMF staff to learn how you can prepare for a bright future tied to the mission of your church.

*"The biggest impact of this process was the unity it created in our Church around a vision for future growth and giving."
- Pastor Matthew Wilke*

Strong Clergy Leaders

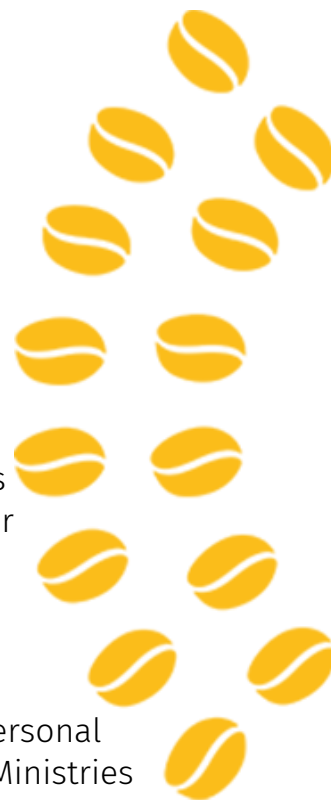
Clergy Financial Wellness Initiative

In November 2022, the Kansas Methodist Foundation concluded its two-year pilot program called the Clergy Financial Wellness Initiative, a leadership development program based on the conviction that financially healthy pastors lead congregations to be financially healthy.

The financial leadership program was facilitated through bi-monthly Zoom meetings over eight months. Participants were provided the necessary resources and training to become more financially healthy in their family life and with their leadership in the church. This program brought clergy together from different churches to talk about stewardship in the church. KMF sought to provide them with resources and information valuable to their own house and God's house.

The key curricula used for the program were Cokesbury's *Saving Grace* for the personal finance component and *Generous Church Leadership* produced by Discipleship Ministries for the local church leadership portion.

KMF found that the impact of this program is very encouraging. Our cohorts were encouraged and equipped for their ministry in the local church. Multiple participants shared how important this work has been for their leadership and in their personal lives. We believe that these capacity building efforts will both make a difference for families, and over time, for the future of the Church.



“There is no other program that does as well in exploring money in personal finance for clergy and regarding churches. Clergy deal with money all the time, but not very thoughtfully. If Jesus thought money was important enough to talk about it as much as he did, clergy should be willing to give our attitudes toward and dealings with money similar time.”

-Lynn Lamberty, Pastor for Augusta FUMC

We continue to look for ways to grow the financial leadership of our local church pastors, lay leaders within our congregations, and those who are faithful disciples of Jesus Christ. All of us are called to be good stewards of the resources entrusted to us and to use them well and wisely to make disciples, change lives, and transform the world around us.



2022 Participants (left to right): Lori Patton Aguilar, Matthew Wilke, Velma Tim, Libby Overdorf, Bellarmee Milosi, Dustin Petz, and Younghwan Won. (The 2021 cohort included 12 total people who participated.)

2022 Grant Recipients

Atchison UMC
Burlington UMC
Fairway Old Mission UMC
Frontenac UMC
Furley UMC
Great Plains Conference
Gypsum UMC
Hamilton Chapel UMC
Iola Wesley UMC

Lenexa UMC
Maize UMC
McPherson FUMC
Moran UMC
Mulvane UMC
Murdock UMC
Ogden Friendship House UMC
Parsons Wesley UMC
Prairie Village Asbury UMC
Pretty Prairie UMC

Saint Francis UMC
Salina Church of the Cross
Tonganoxie UMC
UM Campus Ministries: Washburn
Wellsville UMC
Wichita Chapel Hill UMC
Wichita College Hill UMC
Wichita Heart of Christ UMC
Wichita St. Paul's UMC

New Pathways for Discipleship Grant Justice Ministry

The Kansas Methodist Foundation is pleased to announce a new Pathways for Discipleship grant focused on Justice Ministries.

In Luke 4, Jesus proclaims that his ministry includes preaching good news to the poor, proclaiming release to prisoners, recovering sight to the blind, liberating the oppressed, and proclaiming Jubilee.

Starting in 2022, justice ministry grants will be awarded to Methodist churches and organizations in Kansas for programs focused on healing racial divisions, increasing equity among God's children, encouraging inclusion, and broadening people's understanding of diversity and bias.

The justice ministries pathway is one of four pathways in the Pathways for Discipleship grant program. The matching grants are awarded to churches and organizations across Kansas to advance ministries, especially in ways that are creative, innovative, and new.

Other Pathways for Discipleship grant areas include: Children and Youth Programs, Ministry and Outreach, and Leadership Education.



2022 Seminary Scholarship Recipients

Matthew Borland
Tiffani Brewer
Yolana Byers
Kim Changhyun
Debra Copple
Allyson Drummond
Robert Fillmore

Wesley Gately
D. Jeff Goetzinger
Jeff Graber
Nicole Guthrie
Anny Kalingwishi Kapundu
Charles Kitua
Chris Nord

Matt Ozment
Victor Peterson
Abraham Ruffcorn
Amaris Towle
Valencia Vogts-Scribner
Grace Woods
John Wesley Young

Thank you to our growing partners in 2022

Thank you to the churches and organizations who created new Managed Funds with KMF in 2022!

Church of the Resurrection Foundation
 Derby Woodlawn UMC
 Emporia State University Campus Ministry
 Great Bend Trinity UMC
 Manhattan College Avenue UMC
 McPherson First UMC

Olathe Grace UMC
 Overland Park Indian Heights UMC
 Salina Church of the Cross
 Sedan UMC
 Wichita Pleasant Valley UMC
 Wichita University UMC

Thank you to the families who created new Permanent Funds, Term Funds or Donor Advised Funds with KMF in 2022!

Bill and Nancy Anton
 Lyle and Trudy Barker
 Adam and Ashley Barlow-Thompson
 Rev. Dr. Stan Basler
 Randy and Barbara Clinkscales
 Bryan* and Lori Douglas
 Martin and Cynthia English
 Rev. Robbie Fall
 Andy and Jenny Hutchinson
 Rev. Ron and Raelene Kite

Rev. Richard* and Cheryl Lewis
 Carl and Mary Lou (Bauer)* Martin
 Phil and Jeanne* Martin
 Leland and Hazel Parker
 Phil and Staci Payne
 Paul and Kathy* Queen
 Harold* and Helen* Scott
 Rev. Dr. Marshall and Janice Stanton
 Bishop Delores Williamston

*indicates those that are deceased

Investments

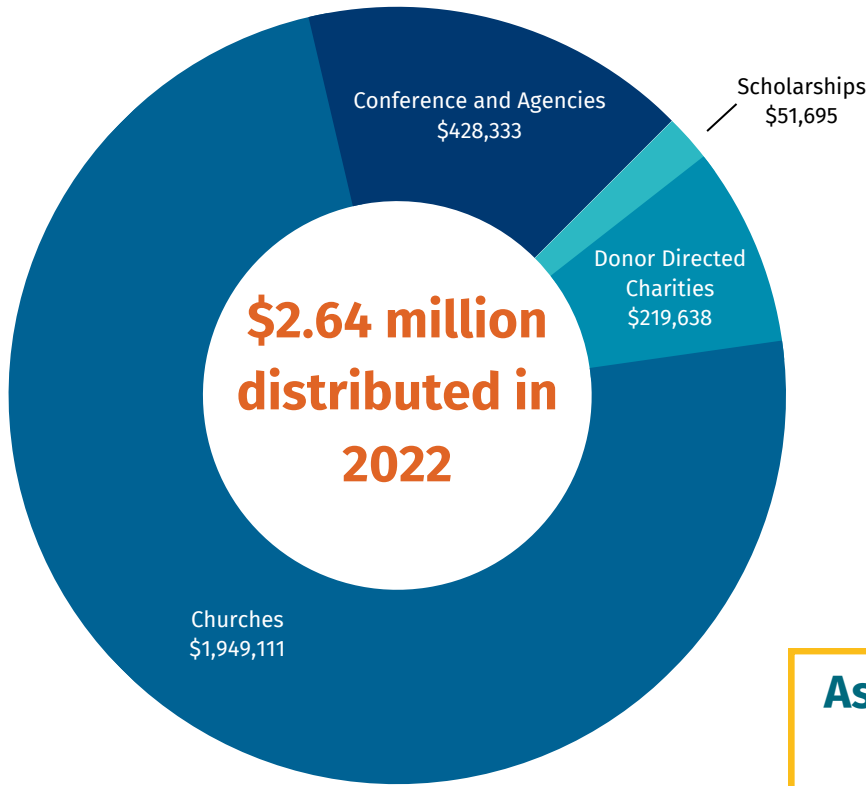
Through our partnership with Wespath Institutional Investments, the Kansas Methodist Foundation provides competitive returns while investing in sustainable and socially responsible ways. We are grateful for the more than 150 churches and organizations who invest their resources for ministry with KMF.



	2022	Annualized		
		3-years	5-years	10-years
Balanced Fund	-17.09%	2.29%	4.06%	6.36%
Equity Fund	-21.11%	3.30%	5.08%	8.20%
Fixed Income Fund	-12.77%	-2.27%	0.38%	1.54%
Short Term Fund	1.35%	1.43%	1.04%	1.17%

**Historical returns are not indicative of future performance. The Balanced Fund performance is the Wespath Multiple Asset Strategy performance. The Equity Fund returns represent the historical data for the Wespath U.S. Equity Fund (55%) and the Wespath International Equity Fund (45%) until October 2022, when the asset allocation changed to Wespath U.S. Equity Fund (45%), Wespath U.S. Equity Index Fund (20%), and Wespath International Equity Fund (35%). The Fixed Income Fund performance is the Wespath Fixed Income Fund. More information about the funds and benchmarks can be found at <https://www.wespath.com/funds>. The Short Term Income Fund is a combination of multiple investment instruments of the Foundation. The Foundation hired Wespath Institutional Investments on November 1, 2019. The Administration Fee of the Foundation is not included.*

Helping Grow Ministry in Kansas



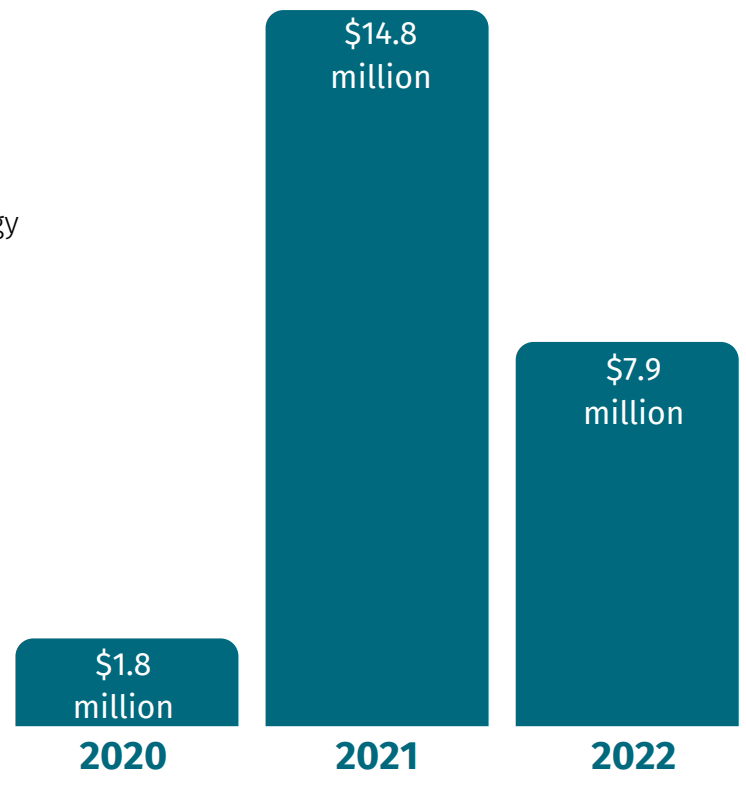
Assets Under Management
\$68.8 million as of
December 31, 2022

Through your generosity, KMF is proud to distribute resources for ministry to:

Numerous local churches, plus

- | | |
|----------------------------|-------------------------------|
| Africa University | New Hope Shelter |
| Aldersgate Village | Red Bird Mission |
| American Bible Society | Saint Paul School of Theology |
| Asbury Park Foundation | Southwestern College |
| Baker University | Summer Assembly Camp |
| Camp Chippewa | The Cedars |
| Camp Horizon | The Nature Conservancy |
| Camp Lakeside | UM Campus Ministry |
| EmberHope Youthville | UM Open Door |
| Genesis Family Health | UMCOR |
| GraceMed Health Clinic | United Way of the Plains |
| Heifer International | Wesley Towers |
| Kansas Wesleyan University | World Vision |
| Legacy Ministries | Wounded Warriors |
| | and many more! |

KMF New Deposits



2023 KMF Board of Trustees

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Shawn Wyatt
Hutchinson

A Word From Our Board Chair

The Foundation is moving into 2023 with an optimistic commitment to the Methodist organizations we serve. KMF has grown under the leadership of our President and CEO, Dustin Petz, and the members of our Board of Trustees bring strong talents to the organization.

We recognize the challenges that local churches may experience and the responsibility of the Foundation to assist congregations and individuals as they share their financial resources to enhance the ministry of their local church. The Foundation is increasing its services to congregants in the areas of Estate Planning and Legacy Giving. We also provide grants to local churches for new mission programs through the Pathways for Discipleship program.

Issues such as inflation, rising interest rates and market volatility are always in the forefront as the Foundation works to provide effective fund management through a proven socially responsible investment platform. The Foundation is committed to support the Methodist vision as we move into the future.

-Sandra Holt, Board Chair

KMF Staff

Rev. Dr. Dustin Petz

President and CEO

Tyler Curtis

*Chief Development
Officer*



Stevie Lacy

*Admin. & Operations
Associate*

Gloria Markus

Director of Finance

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P.O. Box 605
Hutchinson, KS 67504

29
seminary scholarships
awarded

*Growing
Ministry*
in
2022

28
Pathways for
Discipleship grants
awarded

\$7.96
million
in new deposits

\$2.64
million
in charitable
distributions

38
new accounts