

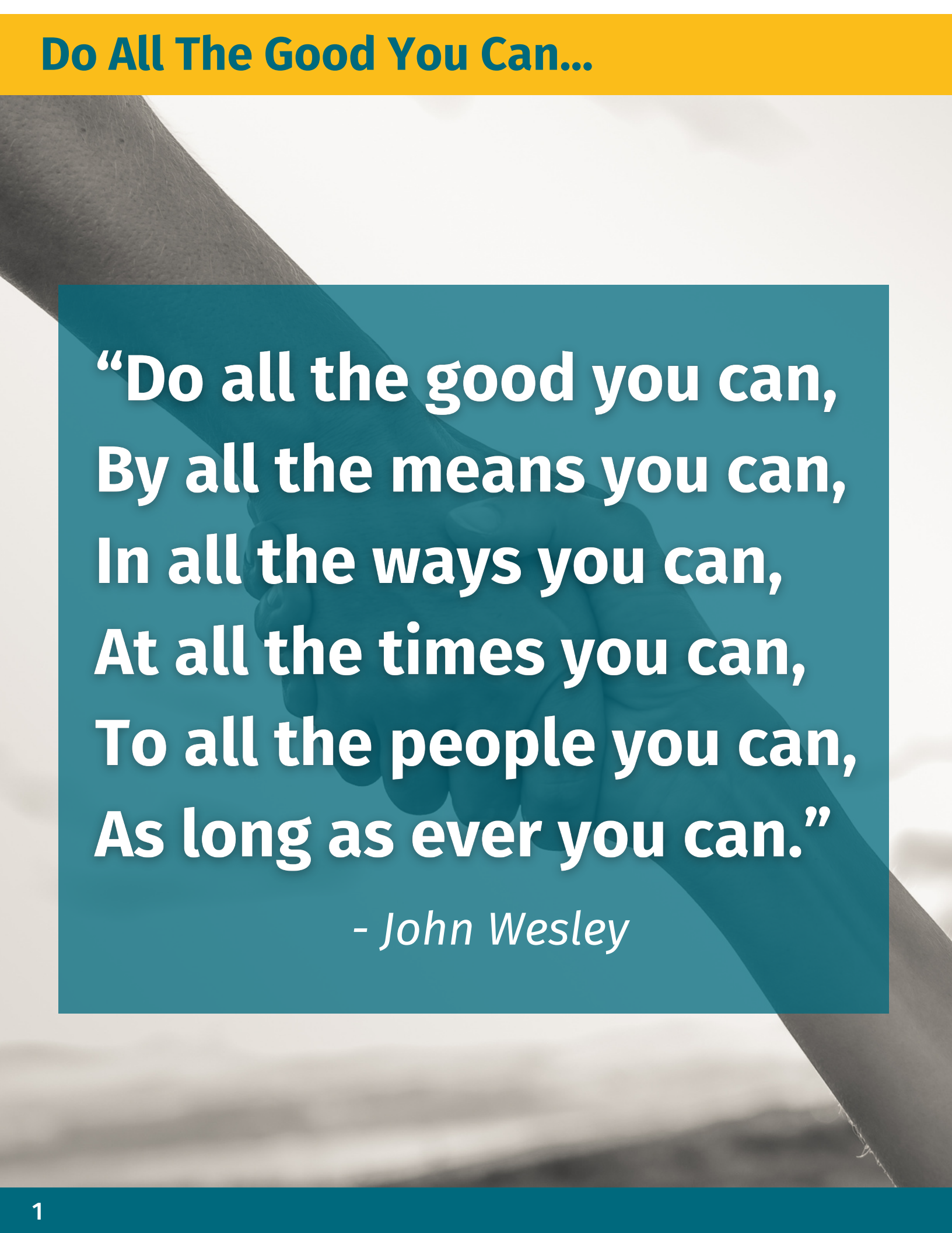


# KANSAS METHODIST FOUNDATION

*Ministry Grows Here*



## 2023 IMPACT REPORT



**“Do all the good you can,  
By all the means you can,  
In all the ways you can,  
At all the times you can,  
To all the people you can,  
As long as ever you can.”**

*- John Wesley*



# Message from KMF Board Chair & KMF President

**Grace and peace to you in the name of Jesus Christ, the Risen One!**

This year, we decided to share with one voice our words of appreciation and hope. Thank you to all our partnering churches and organizations, as well as the many Methodist families who continue to connect with us to make an impact because of your faith. We are grateful for you and honored to serve both with you and alongside you.

***Throughout 2023, we made an intentional effort to grow our ministry and service of legacy giving. This new effort was welcomed by many and we intend to continue the momentum into 2024.***

As you will read in the 2023 Impact Report, the Kansas Methodist Foundation had great success with the launching of our new program, Putting Your House In Order. The response was positive in terms of both participants in the program and the steps those families took regarding estate planning, legacy giving, and memorial planning. The participants have improved their lives by making decisions that fit their desires in these areas and have made a “gift of love” that their families can receive and follow. The outcome is a win-win situation for everyone. We give thanks for the vision and faithful ministry of Tyler Curtis in delivering this new program.

We continue to find many Methodists across Kansas who want to learn more about how best they can support their church and other charitable causes through their estate. Many are also looking for a holistic partner to help them in making progress on this part of life. KMF is poised to come alongside many to help them create a plan, to find the technical advice, and to then steward gifts given to make a lasting impact on the church and the world.

Another undertaking of KMF in 2023 was moving our operation to a new back-office accounting software. This new tool will allow us to better serve our partners in many ways, including greater efficiencies for staff, allowing online access to funds, stronger reporting options, and help us better fulfill our administration function. We are grateful for Gloria Markus, Ali Foster, and Tyler Curtis, for their efforts to learn a new system, and begin using it to strengthen our ministry. We believe the outcome will be worth the behind-the-scenes hard work and attention to detail. Thank you for your patience as we transition.

As an organization, we are committed to growing a relationship with you and others across our connection. We are honored to support faithful Methodists in the stewarding of resources and growing in our generosity for ministry. Thank you for the opportunity to make a difference through our faith and our finances.

Sincerely,  
**Sandra Holt**, KMF Board of Trustees Chairperson  
**Dustin Petz**, President & CEO



# KMF Offers Estate Planning & Legacy Program

## Putting Your House in Order

Last year, the Kansas Methodist Foundation rolled out a new program aimed at assisting Methodists in getting their affairs in order. Almost 100 Methodists took part in the program during its first year.

**Putting Your House in Order is a three-part series that covers:**

- 1. Estate Planning**
- 2. Legacy Giving**
- 3. Memorial Planning**

Each hour-long Zoom session provides useful information and needed resources to guide participants in putting their plans in place. Topics such as wills versus trusts, durable powers of attorney, advanced health care directives, legacy giving, endowments, and documenting important personal and family information are all addressed during the program.

KMF staff educate participants on options, answer questions, and walk side-by-side with these faithful Methodists as they create plans reflecting their wishes. According to Rev. Lance Carrithers, a member of the inaugural cohort, “I think what is perhaps most valuable is the time participants spend individually with KMF staff between sessions. Those conversations were extremely beneficial.”

While KMF staff are not licensed attorneys who can draft estate documents, they will support participants in finding an estate attorney to draft legal documents as part of the process. KMF has partnered with several attorneys across Kansas to whom they can refer.

**As an added bonus**, people who participate in all three sessions and complete the required tasks have \$500 deposited into their personal legacy fund at the KMF. The Foundation seeks to reward participants for being good stewards of their resources by seeding the legacy they choose to create.

Cohorts are offered in the Winter, Summer, and Fall. Be looking for opportunities to join a cohort soon. We are honored to assist our many Methodists as they make their plans and leave their legacy.





# Kids Spread Wings & Fly...

## Empty Nest Spurs Need to Revise Plan

***The Kansas Methodist Foundation believes it is never too early to plan when it comes to estate planning.*** Every adult needs a plan, which includes a last will & testament, durable powers of attorney for both health and finance, and a living will. Though the documents may be simple during a young person's life, part of being a responsible adult includes having a plan.

Young families also need a plan that includes all of the items above with special focus on child care and guardianship in the event parents die with minor children. At this stage, the plan may not be much more complex than a young adult's, but the addition of naming guardians and establishing a way to provide for their children in case of an untimely death are critical components at this stage.



For most families, the time will also come when the children earn their wings. Babies and children grow into kids and young adults. As they do, they become more independent and start supporting themselves. It is in this stage where Rev. David and Tracy Livingston are finding themselves.

Rev. David Livingston has been an ordained pastor in the Great Plains Conference for 25 years. Since 2019, he has served as the senior pastor of Old Mission UMC in Fairway, KS. Tracy is a special education professional and a board-certified behavioral analyst. Her work has largely focused on autism issues.

David and Tracy have two girls, one in college and one soon to be in college. While still dependents, the Livingstons found themselves at the point in their lives when a simple will and guardianship plan was no longer adequate.



# Kids Spread Wings & Fly... (cont.)

## Empty Nest Spurs Need to Revise Plan

“This is something we have known we needed to do for a long time. Honestly, we just never took the initiative to do it. We took the PYHIO program still unsure if we would actually create an estate plan. The program took all the intimidation away and it made it very simple. At that point we just had to decide if we were going to do what we knew we needed to do or keep putting it off.”

David and Tracy were part of KMF’s first Putting Your House in Order cohort. Composed of several clergy members and spouses, the group completed the program together and provided valuable feedback to KMF on the presentations.

David and Tracy met with KMF staff once a month during group presentations followed by monthly meetings with Tyler Curtis, Chief Development Officer. Together, they worked through questions and discussed options related to establishing a trust and creating a legacy.

Following their time together, the Livingstons were connected with an attorney in the Kansas City area to draft their documents. KMF staff assisted in arranging an initial meeting and facilitated a conversation to clarify the Livingston’s desired terms and conditions. Following that meeting, the attorney created a draft. Once again, KMF staff assisted in reviewing the document and providing feedback.

In the end, David and Tracy created a revocable living trust and updated their power of attorney documents and living wills. They also created a legacy fund at the KMF to facilitate their charitable wishes.

What happens next? Will their plan change? Sure, it will. Can they make amendments as life continues to happen and their family situation further evolves? Of course. Are they prepared for both the unlikely event of a premature death as well as the inevitable? Yes, they are.

# Kids Spread Wings & Fly... (cont.)

## Empty Nest Spurs Need to Revise Plan



We had three goals. First, and most importantly, with one child still in high school and the other in college, we wanted to make sure they were protected. Second, we wanted to establish a long-term plan for our estate. Third, we wanted to be able to include charitable giving in the estate plan and have the ability to change that giving easily if our priorities shift. The third goal seemed like the trickiest but Tyler and KMF were able to make it simple, too.

No matter your age, it's never too early to plan. And once you have a plan, it's wise to continue to refresh it to reflect your wishes at different stages of life. Single. Married with no children. Married with young children. Empty nesters. Retirees. Aging seniors. Each stage of life and life situation entails different priorities.

For both now and the foreseeable future, David and Tracy have peace of mind knowing they are prepared and ready for this stage of life as the kids spread their wings and begin flying the coop, leaving them as empty nesters.

“Tyler was great at helping us understand the decision-making process we needed to go through. He was always informative without pushing his opinion. We made all the decisions. Sometimes when a person who is about to have ‘routine’ surgery shares their anxiety with me, I remind them that they are anxious because while the surgery is routine for the surgeon it isn’t routine for the patient. In the same way, this is a regular part of what KMF does. They knew the questions we should be asking and then let us answer the questions. They could give advice based on prior experience without taking away our decision-making ability. It was clear that for them this was routine, which made it much less stressful for us.”

## Are you prepared for your next stage of life?

If not, KMF is here to help you just like we helped David and Tracy. Please contact Tyler Curtis at [tyler@kansasmethodistfoundation.org](mailto:tyler@kansasmethodistfoundation.org) or at **620.664.9623** for more information.



# Stewarding the Land & More...

## Morris County Family Uses KMF's Estate Planner to Update & Refine Trust

When you think of Kansas, images of land, a barn or two, some tractors and combines, and a farmhouse are sure to come to mind. Located in Morris County northwest of Council Grove, Leland and Hazel Parker's home reflects this image of a Kansas farming family. Having raised their five kids on their family farm, the couple now follows their grandkids, attending as many games and performances as possible.

Like most farmers, the Parkers are not retired. Far from it. While their son, James – or perhaps “Jim” and at times “Jimmy” - has taken more and more of a role in the family business, Leland continues to work every day while Hazel supports him, Jim, and others. On a farm, there is always work to be done.

Part of that work also entails succession planning. Farmers are in a unique position: self-employed and typically owners of expensive equipment as well as land, an asset that has almost assuredly appreciated in value over time. These days, there may not be a family member who wants to take over the farming operation. In the Parker's case, this is not true. Jim has been working alongside his dad since he was old enough to walk, and he plans to be the third generation to farm the Parker family's land.

While this is in many ways ideal, it makes estate planning complicated. Knowing that many of their assets are tied to the farm, how do Leland and Hazel fairly pass along resources to both James and his four siblings? How do you divide non-cash assets? What if something happens and one of the children pre-decease Leland and Hazel? How do they support the grandkids they love so much?



# Stewarding the Land & More... (cont.)

## Morris County Family Uses KMF's Estate Planner to Update & Refine Trust

Lots of questions. And fortunately for the Parker family and others, the Kansas Methodist Foundation offers the services of an expert estate planner, John Griffin, Jr. Esq. With 33 years of experience in estate planning, including extensive experience with farm succession planning, John and his firm Stewardship Counseling, LLC, worked with the Parker family to update an existing plan and put new terms in place.

By including Jim in the discussions, the family was able to work through tough questions and address issues of fairness together. In the end, a new plan along with updated supporting documents provided Leland and Hazel with the peace of mind they were seeking.

Like many of our faithful Methodists, the Parkers are stewardship-minded. Practitioners of sustainable farming and livestock practices, the Parkers desire to not only steward well the land they have been entrusted with but also the rest of their assets, always focused in actions that produce the most good. Thanks to KMF, John Griffin and the Parkers worked together to accomplish this goal.



If you would like the opportunity to meet with John Griffin to either review an existing plan or create a new plan, please contact Tyler Curtis at **[tyler@kansasmethodistfoundation.org](mailto:tyler@kansasmethodistfoundation.org)** or at **620.664.9623**.

*John's services are offered at no cost to you as a service of the Kansas Methodist Foundation.*



# Burton Family 'Bunches' Gifts...

## Leveraging Donor Advised Funds

When it comes to charitable giving techniques, Donor Advised Funds (DAF) are often overlooked and underutilized. Not so for Pete and Cindy Burton of Stilwell, KS. Having been intentional and disciplined about giving proportionally throughout their adult life, the DAF provides the Burtons with an easy way to organize and make charitable gifts.



**“It just makes our giving so much easier,” says Pete. “Our gifts come out of a single bucket.”**

The Kansas Methodist Foundation has a close relationship with Stilwell United Methodist Church. Stewardship presentations and generosity workshops provided opportunities for the Burtons to meet KMF staff and learn about our programs.

In 2018, the Burtons established a Donor Advised Fund at the KMF. Since then, Pete and Cindy have made several gifts to their donor advised fund at opportune times and then direct KMF to make gifts to their chosen charities on their behalf.

### But why do they do that?

We know people who use other foundations and organizations to manage their donor advised funds, but we wanted to partner with an entity that shared our values and were more aligned with our charitable goals, so we chose to partner with the KMF.

**- Pete & Cindy Burton**



# Burton Family ‘Bunches’ Gifts... (cont.)

## Leveraging Donor Advised Funds

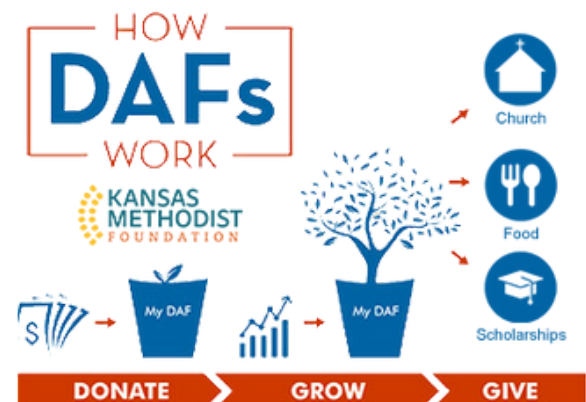
In 2018, the standard deduction for tax purposes *doubled* from the previous amount and has been adjusted for inflation ever since. For 2024, the standard deduction is \$14,600 for an individual or \$29,200 for a couple. What does that mean? Prior to 2018, many people and families itemized deductions since those amounts typically added up to a total higher than the then standard deduction. Mortgage interest, educational loan interest, child tax credits, medical expenses, and charitable gifts commonly resulted in deductions that would lower tax liability and exceeded the then allowable standard deduction.

Since 2018, though, individuals and families typically no longer have itemized amounts totaling more than the standard deduction. In 2020, over 87% of tax filers used the standard deduction. While a higher standard deduction makes it easier for tax preparers, people who make charitable gifts may no longer “feel” the benefit of their charitable gifts when it comes tax time.

**Enter in Donor Advised Funds.** The standard deduction increase ushered in a new giving opportunity, and DAFs are a significant part of that strategy. If people have the ability to do so, then they can leverage a giving technique known as “bunching.” By transferring a more significant dollar amount to a DAF in a single tax year, the donor may be able to itemize in Year A but use the amount stored in the DAF for charitable gifts in subsequent years.

DAFs function like a charitable savings account. Gifts are made and credited for tax purposes at the time the donor makes the contribution to a DAF. Afterwards, the donor can use those funds at any time to make gifts to charities of their choice. Funds can be given, used, and then replenished at opportune times to continue the cycle.

“Once we went through one annual cycle with our DAF, we were sold on its value. It makes our giving so much more efficient,” says Pete.



# Burton Family ‘Bunches’ Gifts... (cont.)

## Leveraging Donor Advised Funds

The chart below highlights how an individual who wants to make four years’ worth of gifts in a single year would use this technique.

	2024	2025	2026	2027
DAF Contribution	\$ 45,000	\$ 0	\$ 0	\$ 0
Your Annual Gifts to Charities	\$ 13,000			
Your Annual Gifts to Charities from Your DAF		\$ 14,000	\$ 15,000	\$ 16,000
*Annual Tax Deduction	\$ 58,000	Stan Deduct	Stan Deduct	Stan Deduct

\*Note: Tax deductible charitable gifts are capped at 60% of Adjusted Gross Income (AGI), and unused deductions can be rolled over to other tax years for up to five years. KMF recommends working with your tax professional to analyze your tax situation and ensure DAF’s are right for you.

Most people are not sitting on enough cash to make this technique helpful; however, consider these scenarios:

- **Do you have appreciated stock?** Gift it to a DAF and use those proceeds for your giving starting this year and in years to come.
- **Do you own rental properties?** Gift them or a portion of the interest in that property to your DAF and use the proceeds from the sale to make your charitable gifts.
- **Are you a farmer who has depreciated equipment that still has significant value?** Gift that asset to your DAF, sell the equipment, and use those proceeds for giving purposes.

According to Pete and Cindy, their DAF has been a useful giving tool.



The beauty of it is that the donor advised fund takes the question of taxes off the table. We already have our tax receipt and tax deduction. Now we can just give generously to charities and causes we want to support without having to think about any tax-related issues.



Learn More  
About DAFs

# Endowment Program Strengthened

**“New Wine into New Wineskins; and Both are Preserved”**



One of the ministries the Kansas Methodist Foundation provides to the churches we serve is helping them strengthen endowment programs and legacy giving ministries. KMF comes alongside congregations to review policies, strengthen donor development programs, and steward well resources to support ministry and mission. This specialized ministry allows KMF to be a key partner with congregations to grow resources for ministry.

***At the beginning of 2023***, the Kansas Methodist Foundation began a process of working with College Hill United Methodist (CHUM) Foundation to do a holistic review of their endowment program and ministry. KMF President and CEO, Dustin Petz, met with the Foundation board to review policies and consider best practices to organize and strengthen the operation in order to serve well the congregation.

Before long, it became apparent that a new way of operating could help CHUM better steward their funds to support the church's ministry. The questions became:

- **Is there a new way to function that could reduce the administrative burden of managing a foundation?**
- **Would a new way of organizing effectively refocus the church's efforts to cultivate new gifts?**
- **Is there a better way to support CHUM's ministry and deploy funds for ministry?**



# Endowment Program Strengthened (cont.)

After much discernment and advice from outside legal counsel, it was finally decided that the College Hill United Methodist Foundation would terminate as a separately incorporated foundation and gift those assets to the Kansas Methodist Foundation for the benefit of the College Hill United Methodist Church. In essence, this decision leveraged the KMF's professional expertise to administer and steward the funds so that the church could focus greater attention on the ministry the funds support and being the church God has called CHUM to be, for such a time as this.

The Kansas Methodist Foundation is excited about this expanded partnership and is committed to helping CHUM grow in stewardship and generosity so that the work of the church can continue, expand, and provide a place for new people at College Hill United Methodist Church.



*I encourage other churches to consider this model. KMF is a resource to all of our churches & we benefit from their expertise & professional knowledge in this area. Using KMF frees me & my congregation to do what we're an expert in: sharing grace beyond belief!*  
- Rev. Jill Sander-Chali, CHUM

*I believe this will relieve CHUM's staff & lay leaders from the administrative burden of managing our own Foundation. It allows us to focus our energies on raising money for the future & deploying funds to support & grow our current ministries!*

- Rev. Jill Sander-Chali, CHUM



**If your church or agency is curious about new ways of functioning to grow resources for ministry, please contact KMF. We would be happy to explore options to serve well.**

# Seminary Scholarships

## “Here I am, Lord, Send Me!” Scholarships Provide Way to Support Those Who Hear God’s Call

**What if every faithful Methodist disciple called by God to serve as a pastor could say, “Yes” with the confidence that they had the support of the church throughout their formation process as they prepare to lead the future church?**

Of all the factors that make a difference in the life of the Church and in the world through the Church, the training and formation of our clergy leaders has the greatest impact.

Scholarships play a vital role in the life of the church, ensuring that called clergy can access the necessary training without financial barriers. Methodist theology emphasizes education as a means to deepen understanding of scripture, theology, and the practices of ministry. By providing scholarships, the church invests in the development of knowledgeable, skilled, and committed clergy who can effectively serve congregations and communities.

**Firstly**, scholarships make it possible for individuals from diverse socioeconomic backgrounds to pursue theological education. Many pastors may not have the financial means to afford an advanced degree, which continue to increase in expense. Scholarships alleviate these financial burdens, enabling students to focus on their formation and ministry preparation without worrying about financial constraints.

**Secondly**, scholarships help attract and retain talented individuals to ministry. By offering financial support, the church encourages individuals with a passion for ministry to pursue their calling without hesitation. This fosters a diverse and dedicated cohort of pastors who bring unique perspectives and talents to their congregations.

**And Finally...**



# Seminary Scholarships (cont.)

...Scholarships ensure Methodist pastors receive high-quality theological training from accredited institutions. This education equips pastors with the knowledge, skills, and spiritual formation needed to effectively lead congregations during times of change, preach effective sermons, provide loving congregational care, and engage in impactful community outreach.

In short, scholarships are essential for cultivating a vibrant, well-equipped, and inclusive community of pastors who can effectively lead their congregations to fulfill the church's mission in the world.

The Kansas Methodist Foundation stewards two seminary scholarship funds to provide resources for this vital formation function of the church: **Pass the Torch Fund** (in partnership with the Great Plains Association of Retired Clergy and Spouses - GPARCS) and the **KMF Seminary Scholarship Fund**.

*Would you be interested in giving to make a difference for the leadership of the church for generations to come?* The staff of the Kansas Methodist Foundation would be honored to visit with you about either making a gift to one of these current scholarship funds or creating a new scholarship in honor or memory of someone to make a lasting impact on the church and its leadership.



"When I said "yes" to God's call to credentialed pastoral ministry, I was taking a leap of faith. I knew seminary was a necessary, but expensive, step on my pathway to ministry. I am grateful for the seminary scholarships provided by the Kansas Methodist Foundation. This financial support has significantly reduced my cost of tuition, allowed me to receive a comprehensive theological education, and given me the opportunity to respond to God's call with minimal student debt." - **Jeff Graber, Pastor of Halstead First United Methodist Church & Seminary Student at Saint Paul School of Theology**

"My education has always been very important to me. Being able to continue my education through seminary has been one of the biggest blessings I've had. This first year of Seminary has been so rewarding, full of learning and getting to know my new home well. The KMF Seminary Scholarship has allowed me to focus on school and takes some of the worry out of higher education. I am so grateful for the people who have made the KMF Seminary Scholarship, and the Pass the torch Scholarship possible." - **Carly Redding, Certified Candidate & Seminary Student at Garrett Evangelical Theological Seminary**





## 2023 SEMINARY SCHOLARSHIP RECIPIENTS

Amarais Towle  
Anny Kalingwishi Kapundu  
Carly Redding  
Charles Kitua  
Chris Nord  
Debra Copple  
Deontae Hayden  
Grace Woods  
Jeff Graber

Matt Ozment  
Matthew Borland  
Nicole Rae Guthrie  
Rachel Feters  
Robert Fillmore  
Stephen Chunguk Sim  
Tiffani Brewer  
Victor Peterson  
Yolanda Byers

“When I started looking at seminaries, I knew I wanted to attend school in a different context that would provide me with meaningful experiences I could bring back to Kansas. Being in Boston has allowed me to live and work with people from all around the world and learn new ways of thinking about, and doing ministry with, God’s people. The scholarships I have received from the Kansas Methodist Foundation have allowed me to seek this intentional formation without accruing the extra debt of living far away or sacrificing the education I desired.” - **Amarais Towle, Connections Minister at WesleyKU (KU Campus Ministry)**



## 2023 PATHWAYS FOR DISCIPLESHIP GRANT RECIPIENTS

Arlington UMC  
Belleville: First UMC  
Burlington MC  
Fairway: Old Mission UMC  
Great Plains Board of Ordained  
Ministry & Mercy Justice Team  
Great Plains Retired Clergy & Spouses  
The Hub Argentine  
K-State Wesley  
McPherson: First UMC

Murdock UMC  
Newton: Trinity Heights UMC  
Peace Connections, Inc.  
Phillipsburg UMC  
Pretty Prairie UMC  
Sedgwick County Multifaith  
Justice Organization  
Tonganoxie UMC  
Wichita: Heart of Christ UMC

# *Thank You* To Our Growing Partners in 2023!

**Thank you to the following churches and organizations who created new Managed Funds with Kansas Methodist Foundation in 2023:**

Andover UMC  
Bird City: Immanuel UMC  
Café Quetzel  
Hutchinson: First UMC  
Hutchinson: Trinity UMC  
Fredonia: First UMC

Johnson: First UMC  
Shawnee: Monticello UMC  
Tonganoxie UMC  
Wichita: College Hill UMC  
Wichita: First UMC  
Wichita: University UMC

**Thank you to the following families who created new Permanent Funds, Term Funds or Donor Advised Funds with Kansas Methodist Foundation in 2023:**

Michael and Judith Anderson  
Revs. Trudy Kenyon Anderson and  
Russell Anderson  
Revs. Lora Andrews and Carter Ellis  
Revs. Adam and Ashley Barlow  
Thompson  
Peter and Cynthia Burton  
Revs. Joshua and Claire Clough  
Rev. Mary Courtney and James Behan  
Duane and Cindi Dunn  
Rev. Bruce and Melissa Emmert  
Timothy and Victoria Fleming  
Don Foster  
Revs. Bill and Melissa Gepford  
Cathryn Harrison  
David and Donna Higbee  
Bill and Sarah Johnston  
Rev. Ronald and Raelene Kite  
John and Sissy Krehbiel  
Les and Rev. Karen Lampe  
Rev. Richard\* and Cheryl Lewis

Sheri Lichtenberger  
Rev. David and Tracy Livingston  
Dale and Betty Lybarger\*  
Nancy and Frank Mattke  
Rev. Gene McIntosh  
Bruce and Sandra Milburn  
Rev. Ken and Nancy Parker  
Leland and Hazel Parker  
Mark and Kayla Queen  
Dan and Carrie Riggs  
Rev. Amy Lippoldt and Matthew  
Sandbulte  
Allen and Berna Scott\*  
Brent and Carol Shelton  
Ken and Debi Sokol  
Rev. James and Nedra Starkey\*  
Faye Summervill  
Pastor Libby Themis  
Robert and Sharon Thom\*  
Bobby and Kerri Thompson

# Investments

By partnering with Wespath Institutional Investments, KMF offers competitive returns while prioritizing sustainable and socially responsible investing. Over 150 churches and organizations already trust KMF to manage their resources for ministry. Join them and invest in a brighter future for your congregation!



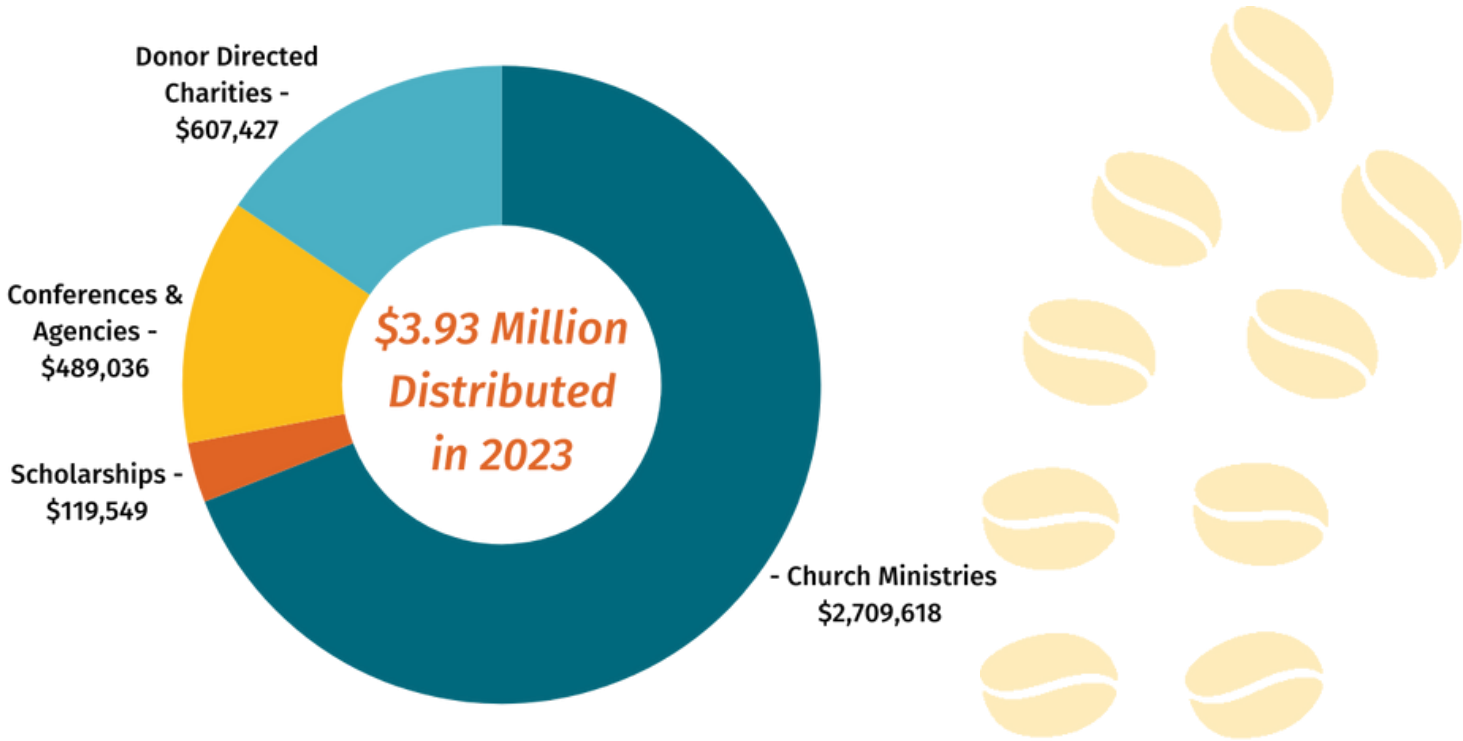
## Annualized

	2023	3 Years	5 Years	10 Years
<b>Balanced Fund</b>	14.32%	0.81%	8.24%	6.11%
<b>Equity Fund</b>	20.10%	2.04%	11.13%	7.67%
<b>U.S. Equity Index Fund</b>	26.09%	8.42%	n/a	n/a
<b>Fixed Income Fund</b>	7.98%	-2.35%	2.15%	2.40%
<b>Short Term Income Fund</b>	4.15%	2.25%	2.41%	1.51%

\*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 U.S. Equity Index Fund is the Wespath U.S. Equity Index Fund. 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

\$75.0 MILLION AS OF DECEMBER 31, 2023



# 2024 KMF BOARD OF TRUSTEES



Sandra Holt  
**Chair, Overland Park**



Rev. Lance Carrithers  
**Vice-Chair, Derby**



Gary Beach  
**Secretary, Manhattan**



Melinda Parks  
**Treasurer, Lenexa**



Randy Clinkscales  
*Hays*



Rev. Andrew Conard  
*McPherson*



Sue Dondlinger  
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Duane Dunn  
*Manhattan*



Rev. Evelyn Fisher  
*Wichita*



Janice Frahm  
*Colby*



Ron Holt  
*Wichita*



Richard Martin  
*Topeka*



Rev. Jo Mead  
*Wichita*



Stephen Morris  
*Hugoton*



Mark Queen  
*Manhattan*



Steve Schulte  
*Stilwell*



Carol Shelton  
*Wichita*



Garth Strand  
*Buhler*



Rev. Michael Tomson-DeGreeff  
*Topeka*



Shawn Wyatt  
*Hutchinson*

# MEET THE KMF STAFF

We are truly fortunate to have such a dedicated and talented staff at the Kansas Methodist Foundation. Their expertise, compassion, and commitment to our mission are invaluable. They go above and beyond every day to serve our donors and charitable causes, making a real difference in the lives of others. It's a blessing to have such a remarkable team working alongside us!

**Rev. Dr. Dustin Petz**  
*President &  
CEO*

**Tyler Curtis**  
*Chief Development  
Officer*



**Ali Foster**  
*Administrative  
Assistant*

**Gloria Markus**  
*Director of  
Finance*



# Setting Financial Goals...

## A Clearer Path to Your Legacy

Many of us have a desire to leave a lasting impact, both on our loved ones and our community. At the Kansas Methodist Foundation (KMF), we understand the importance of faithful stewardship and using our resources wisely. Setting financial goals can be a powerful tool to achieve this.

By setting financial goals and partnering with KMF, you can build a strong foundation for your future giving and ensure your generosity extends for generations to come. We offer a variety of financial tools and resources to help you achieve your goals and make a lasting difference.

## What Are Your Financial Goals for 2024?

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Let Us Know How We Can Help!



100 East First Avenue  
P.O. Box 605  
Hutchinson, KS 67504-0605

## Growing Ministry in 2023



18

Seminary Scholarships  
Awarded



38

New Donor  
Funds



\$3.93

Million Distributed  
Charitably



17

Pathways for  
Discipleship Grants  
Awarded



12

New Managed  
Accounts