What is the Legacy Endowment Fund?

The congregation of Middletown Christian Church (Disciples of Christ) of Louisville, Kentucky has established the Legacy Endowment Fund as another way for people to express their love and support for the vision and mission of the Church.

Through gifts to the Legacy Endowment Fund, our good stewardship can extend beyond our lifetime and provide for the ongoing witness and mission of Jesus Christ, meeting real human needs in our community and around the world.

Gifts to the Legacy Endowment Fund are invested for the perpetuity of the fund. The goal is to provide resources for ministry and to grow the fund to keep pace with inflation. Only the income from the Legacy Endowment Fund will be spent for ministry.

Store up for yourselves treasures in heaven ... For where your treasure is, there your heart will be also.

Matthew 6:20-21

Who Administers the Legacy Endowment Fund?

As specified in the by-laws of the Church, the Trustees of the Church oversee the management of all endowed assets in accordance with guidelines established by the Church's Investment Policy, as adopted by the Church Board.

How Are Investment Managers Selected?

Investment Manager(s) are evaluated a minimum of every 5 years. Requests for proposals are sought by the Trustees, evaluated, and a recommendation is submitted to the Church Board, who must approve all Investment Manager(s) by a majority vote.

If it had not been for the members, staff, and especially the people in our small group, we could not have survived Ann's almost nine-year bout with multiple myeloma. The visits, cards, and prayers sustained us during the difficult times.

Many times, Ann and I discussed the desire to include Middletown Christian Church in our estate plans so the caring could continue for future generations. Soon after her passing, it was necessary for me to revise my estate plans and when doing so I included Middletown as part of the plans. I would encourage others to do the same.

Ralph Wilson

How Are Assets of the Legacy Endowment Fund Invested?

The Church's Investment Policy specifies the guidelines for which assets are invested. The primary purpose of the portfolio is income and the secondary purpose is growth, with a focus on preservation of capital. Assets are allocated within established ratios between the following investment types: equity securities which are publicly traded on the 3 primary U.S. exchanges; fixed income issues that average AA rated or higher; and cash reserves.

The Investment Manager(s) are to maintain well-diversified portfolios to reduce risk and are restricted from using unusual investment vehicles, derivatives, margin accounts and other forms of leverage. The Trustees review investment performance periodically against appropriate industry standard benchmarks.

Middletown Christian Church, 1836-present

Who Determines How the Income Will Be Used?

Gifts to the Legacy Endowment Fund are invested in perpetuity. The income, as defined by the Church's Investment Policy, is distributed annually at the discretion of the Church Board. The Investment Policy identifies the following three priorities for distributions:

- **Children's and Student Ministries** (such as sending youth to camp, support of youth interns, scholarships, and The Learning Center)
- **Mission in the World** (support for external ministries or Church supported partners such as Loma de Luz in Honduras, mission trips, new church starts, and efforts related to evangelism and outreach)
- **Facilities and Grounds** (such as capital improvements, repairs, renovations, and debt elimination)

How Can I Give to the Legacy Endowment Fund?

- Make a memorial gift in someone's name.
- Give stocks, mutual funds, real estate, tangible property, or cash.
- Name Middletown Christian Church in your Will or trust agreement.
- Name Middletown Christian Church as a beneficiary of your Individual Retirement Account (IRA), annuity or life insurance.

Contact Laura Godbey, Business Administrator, 245.9793 or lgodbey@middletownchristian.org.

How Can I Get Involved?

Return completed form to the church office.

I would like to learn more about the Legacy Endowment Fund of Middletown Christian Church.

____ I would like to receive more information about ways to give through:

❍ a Will,

❍ a gift annuity, or

❍ another planned giving instrument.

____ I would like to meet with a representative from the Legacy Endowment Fund Team.

____ I have already made provisions for a gift to the Legacy Endowment Fund through my Will.

____ Enclosed is a check for the Legacy Endowment Fund.

_____

Name

_____

Address

_____

City, State, Zip

_____

Preferred Phone

_____

Email Address

For more information, visit the GIVE page at MiddletownChristian.org.

Middletown Christian Church
Disciples of Christ
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502.245.9793 • MiddletownChristian.org

Middletown Christian Church

Live it out!

The Legacy Endowment Fund of Middletown Christian Church

Providing for an ongoing community of faith where we live out the love of Christ by embracing people where they are.