

2014 ANNUAL SUMMARY

AMERICAN BAPTIST FOUNDATION



American Baptist Foundation Headquarters located at American Baptist Churches Mission Center, 588 N. Gulph Road, Valley Forge, Pennsylvania. Photo by Betsy Manning.

*Commit your works to the LORD and your plans will be established.
Proverbs 16:3 (ESV)*

Commit your works to the LORD and your plans will be established.

Proverbs 16:3 (ESV)

When we commit our thoughts, words and actions to the Lord,
He grants a peaceful reassurance and through us, His will is done.

This expression of faith results in wisdom and clarity as we establish our plans.

As believers in Christ, we know that all things work together for good (Romans 8:28),
and God's glory will be evidenced through our plans as we bless others through our generosity.

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from the Chairman

Dear Friends,

It has been wonderful to witness ABF's reemergence alongside a spirit for cooperation and collaboration over the past few years. As we sustain our mission to our Members and extend offerings to the larger *American Baptist Churches (ABC) USA* Family, it is impossible to predict the exact road we will travel; however, we have been blessed with increase and our ministry to our Members and ABC family has increased in value. In 2014, members of the Board in collaboration with our Executive Director formed a Strategic Planning Task force to build on current successes and establish a model for sustainable growth. The process included reaching out to ABF's contributing members, partners and constituents using a process called *Alignment Optimization (AO)*, made available through *American Baptist Home Mission Societies*.

In early 2015, the Strategic Plan was unanimously adopted and goals include:

- increasing the number of customized planned giving programs and initiatives through cause-related philanthropy within our ABC family. These programs help ensure the long-term sustainability of each ministry partner and ABF's Strengthening Your Financial Future program provides resources to accomplish this.
- providing the best donor experience possible. There are a variety of options that can assist individuals and families meet current and future financial goals, while providing support for the ministries they hold dear.
- increasing assets under management by boosting the number of Charitable Remainder Trusts, Charitable Gift Annuities, Endowments, Donor Advised Funds, and other planned gifts administered. This will allow ABF to continue to offer quality services in a cost-effective manner.
- expanding our professional networks of attorneys, CPAs, and other financial professionals. This will provide greater resources for our constituents while opening doors for future support for ministry.

ABF desires to see an increase in the awareness and utilization of planned giving vehicles and resources throughout our ABC Family. We will continue to incorporate philanthropic strategies that engage our traditional donors who are typically at or near retirement, while offering solutions that appeal to the needs and values of future generations. Continue to pray with us. Continue to partner with us.

William

Rev. William Carlsen, Chairman of the Board

Dear Brothers and Sisters in Christ,

Throughout my travels and daily interactions, I've encountered a lingering question, *Who is American Baptist Foundation?*

This may seem strange coming from the desk of an Executive Director. **Is this not** the question that should be answered by the leader? More so, should there be a concern that this question is even raised?

Oftentimes, greater emphasis is placed on an answer while profound implications of the question remain neglected. For these reasons every American Baptist leader, employee and partner should ask this question of themselves and the ministries they serve. Framed in the status-quo perspective, the question of "*Who am I?*" aims to uncover much more than a name or an identifying description. It is a question that has the potential to reveal purpose and disclose the true nature of a relationship.

In **Mark 8**, Jesus asked his disciples "Who do [people] say I am?" Jesus was not searching for an answer. He knew who He was. He also anticipated the responses that would compare Him to the prophets. With more profound thought, and deeper connection to the personalization of the question, "*Who do you say I am?*" Peter then replied, "*You are the Messiah.*" Contextually, compared to the general perspective that he was just a great man, this brought a deeper level of understanding of the binding relationship unearthed by those who walked with Him daily.

With that said, let's restate the first question. Who is *American Baptist Foundation* to you?

As we aim to live out our mission "Connecting people who care to ministries that matter," our desire is that your answer will be - a trusted guide, a valued resource, and most importantly your friend in ministry.

Yours in Christ,

Perkin

Rev. Perkin Simpson, Foundation Executive Director

Our Mission

The *American Baptist Foundation* in the USA was created in 1985 by two American Baptist program boards, Education Ministries and National Ministries. In 1989, *International Ministries (IM)* and *Multi-Region Corporation (MRC)* a corporation composed of American Baptist regions became members of what was then renamed the —*American Baptist Foundation (ABF)*

The Foundation encourages gifts to support our contributing partners.



International Ministries (IM) seeks to glorify God in all the earth by crossing cultural boundaries to make followers of Jesus Christ. This global outreach began in 1814 and extends now to more than # countries in Africa, Asia, the Caribbean, Europe, and Central & South America. # missionaries and # partner conventions combine their efforts to fulfill Christ's Great Commission. Many American Baptist volunteers from U.S and Puerto Rico are also engaged in mission partnership activities through *International Ministries*.



American Baptist Home Missions Society (ABHMS) works as Christ's hands and feet in the third largest unchurched population on earth- the United States. Since 1832, the mission has: provided caring ministries that touch those in need, by addressing systems and structures that create needs, advocate for social justice and help to transform the lives of individuals and congregations.



Multi-Region Corporation (MRC) is comprised of majority American Baptist regions. Regions are composed of congregations that share, a common cause to serve Christ, usually within a common geography. They provide the vital link between a local American Baptist congregation and its wider faith family, *American Baptist Churches USA*.

The *American Baptist Foundation* supports the stewardship of all American Baptist individuals, churches, and organizations by providing gift planning, gift management, endowment fund management and educational resources in harmony with the mission of our faith family.

Individuals & Families

Ensure that your values live on by establishing a legacy endowment to support American Baptist ministry and mission.

- **Name.** Endowments can be named in honor of your family or with another name of your choice.
- **Claim.** Contributions are tax-deductible. Gifts of cash, stock, and other assets are accepted. Others may contribute as well.
- **Rejoice.** Income from your gift provides support for the ministries you choose.

Ministries & Churches

ABF's **Strengthening Your Financial Future (SYFF)** program can help your ministry to establish and build a meaningful planned giving program.

- **Vision.** Translate your needs into tools that increase generosity and commitment.
- **Communication.** Confidential consultation and educational resources assists donors in creating affective gift and estate plans.
- **Celebration.** Testimonies of generosity will inspire others to celebrate and support your vision.

Donor Spotlight

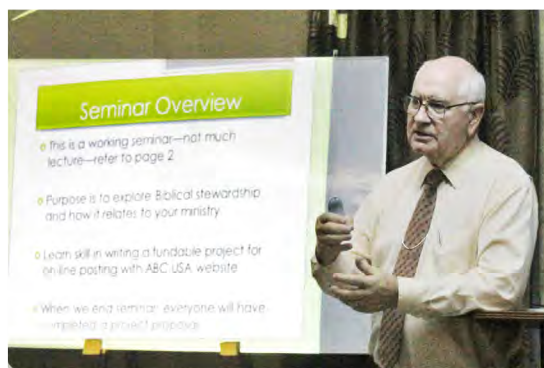
A Chef Who Enjoys His Own Cooking

by Rev. James Layton

After pastorates in New England and the Midwest and having positions like Director of Resource Management for the Lily Foundation's Indiana Youth Institute, Joseph Huse of Flora, Indiana, served as an American Baptist Foundation (ABF) development consultant from 2007 until his retirement this year. He is now an ABF volunteer, continuing to provide information on time-tested estate planning instruments.



Joseph's hobbies include gourmet and Dutch-oven cooking. He jokes, "My mother thought that my brother and I weren't smart enough or good looking enough to attract wives, so we needed to learn how to cook! As a result, I fell in love with cooking and have been doing it ever since." As he joyfully partakes of his own cooking, so Joseph personally relies on ABF's planned giving ideas for him and his family. Until the death of his 96-year-old mother in April of 2015, she received regular income from the charitable gift annuities (CGAs) she had funded over the years. Joseph also has CGAs as well as a charitable remainder unit trust.



He encourages others to consider estate planning, saying: "I'm excited to reach out to those who would benefit by taking advantage of the same Foundation services that I've found valuable. It's stimulating to help people be more financially secure in the present and also be generous beyond their lifetimes. They can make plans so they become a blessing to people they won't ever know—those who will be served by the ministries funded through their estate plans for years to come."

In his ABF role, Joseph has worked primarily with American Baptist churches and ministry partners to design planned giving programs through ABF's "Strengthening Your Financial Future" program. Joseph is an active volunteer beyond his ABF ministry, working with institutions such as Hoosier Village, the Baptist Student Foundation at Purdue University and International Ministries. When you contact ABF, you can, like Joseph Huse, "taste and see that the Lord is good!" (Psalm 34:8a)

2014 International Ministries: IGNITE—House of Hope

Nicanor Alave is a pastor in Toro Toro, a remote village outside of Cochabamba, Bolivia. Cochabamba is the home for the indigenous **Quechua people**. Nicanor and his wife have cemented a ministry with them, seeking to counteract the detrimental effects that urbanization has had on their families and communities.

As a Bolivian Baptist, Pastor Alave had been aware of the work of the **House of Hope** in Latin America and the Caribbean—a ministry that demands a commitment to create missionary projects which are *actual platforms* of sacred spaces. With the assistance of the House of Hope ministry, Nicanor and his wife have developed and maintained one such space on property in the little town of Villa Primero de Mayo. This sacred space is used as a home and a training center for the Quechua women. There they learn artisan skills, allowing them to support themselves and their families. Through this blessing the Quechua women have been empowered to rediscover their value as human beings made in the image of God. The testimony of Pastor Alave and his wife is one of many witnessed by a group of energetic young adult leaders who volunteered their time and efforts in a participatory learning environment with Bolivian Baptists through an *International Ministries (IM)* ministry called **IGNITE**. Funding from the *2014 IM-ABF Palmer Grant Cycle* made possible this wonderful opportunity for IGNITE's 2014 participants. As a result they helped in **reigniting** human dignity in the freedom and transformational creative power of the Holy Spirit.



Commenting on this illustration of God's power, Angela Sudermann, IM's Coordinator of Volunteers in Global Missions, noted, "We have seen that when volunteers visit, learn, hear stories, and become involved in the partner projects, they are more inclined to support the work of the missionary and partner after returning to the U.S."

Matt Toupin, one of the co-leaders, is a perfect example. After returning to the U.S., Matt co-produced short videos to highlight the work of the House of Hope ministries and his Bolivia experience. He has also hosted two missionary partners in the U.S. as they traveled and shared their hearts and ministries. Matt plans to lead a team from his church to return to Cochabamba later this year, continuing his work in ministry and mission by serving as the Hands and Feet of Christ.

Palmer Grant Spotlight

2014 American Baptist Home Mission Societies: Seek Justice

In 2014, the **District of Columbia Baptist Convention (DCBC)** received a **Palmer Grant** to further engage students at *American University* and *George Washington University* to work with churches and government agencies in the collective effort of “*Restoring Justice in D.C.*”

This project addresses the disproportionate incarceration among African Americans and Latinos in D.C. by focusing on structural poverty and limited educational opportunities, which negatively affect the incarcerated, their families, and their communities. DCBC also recognizes that “far too few who experience this cycle of poverty and incarceration come to know the compassionate God of justice and mercy.” By participating in community development projects, volunteering at youth detention centers, or providing hope and encouragement to affected individuals and their families, the partnership of DCBC officials, university students, and government representatives has produced positive outcomes, including:

- additional educational, mentoring and employment opportunities
- improved social consciousness and attitudes towards the incarcerated and their families
- improved church and chaplaincy procedures
- positive transformation of the incarcerated and their families



The **Palmer Grant** has provided needed support by offsetting expenses related to chaplaincy, volunteer assignments, transportation, Bibles and Christian literature, postage, and other administrative necessities. *Isaiah 1:17 (NIV)* reminds us to, “Learn to do right; seek justice. Defend the oppressed. Take up the cause of the fatherless; plead the case of the widow.” In living out these Christian values, DCBC testifies “...that information and human experience in [this] ministry will change the attitudes of participants over time.”



“*Restoring Justice in D.C.*” is a long-term endeavor. DCBC and the *American Baptist Foundation* hope that this network of people, churches, and government, which has united to form a cord of three strands (Ecclesiastes 4:12), will not easily be broken and will lead to continued, positive, and systematic change.



The *Virginia & Gordon Palmer Trust (VGPT) of the American Baptist Foundation* seeks to support priority ministries in partnership with our members: *American Baptist Home Missions Societies (ABHMS)*, the *Multi-Region Corporation (MRC)*, and *International Ministries (IM)*. The *Virginia and Gordon Palmer, Jr. Trust* was created in 1999 as a permanent endowment to the *American Baptist Foundation*. The Trust is to be administered by the Foundation in accordance with established guidelines and principles.

American Baptist Home Mission Society (ABHMS) 2014 Cycle Awardees

1. American Baptist Churches of the Rochester Genesee Region
Community Conferencing as an Alternative to Incarceration
2. American Baptist Churches of Nebraska
Step Up Micro Lending
3. American Baptist Women in Ministry
Breaking Barriers
4. Baptist Peace Fellowship of North America
Justice At The Border
5. Baptist Student Foundation at Purdue
Justice At Purdue
6. Bondage Breakers, Inc.
P.E.E.R. (Purpose Educate Empower Restore)
7. Camp Judson
Restoration Youth Warriors for Christ Camp
8. CHUM
Building the Next Generation of CHUM Volunteers
9. Church of the City
Center for Immigration Advocacy and Support
10. CIC Ministries
Art & Spirit Classes/Transformation: Art from Within Exhibit
11. District of Columbia Baptist Convention
Restoring Justice in D.C
12. Edna Martin Christian Center
EMCC Mission Fellows Program
13. FBCO
Ayuda en la Mesa
14. First Baptist Church of Fall River, Mass.
Faith Based Justice Seeking
15. First Baptist Church Brazil, Indiana
Cradles
16. First Baptist Church of Ann Arbor, Michigan
Leaning Towards Justice: A Young Adult Journey to La Danta, Nicaragua
17. First Baptist Church of Campo Rico
Project 3=4
18. First Baptist Church of Iowa City, Iowa
Restorative Justice Ministry
19. Focus Churches of Albany, Inc.
Hand In Hand
20. Ganges Baptist Church
Outreach Program Utilizing American Education System
21. Greater New Life Christian Center
Greater New Life Young Fathers Project
22. Lakeshore Avenue Baptist Church
Dare to Succeed
23. MBMM
MBMM Refugee Advocacy
24. McKinley Memorial Baptist Church
From Estrangement to Empowerment
25. New Commandment Baptist Church
Jobs Partnerships "Keys & Steps to Personal & Professional Success"
26. Philip's Home
Philip's Home
27. St. Paul Missionary Baptist Church
Stopping the Pipeline to Prison
28. Tabernacle Baptist Church
Karen School Expansion
29. The Crossing, Inc.
Quest: Borderlands
30. The Hope Center of Pullen
Career Development Program
31. The Olin T. Binkley Memorial Baptist Church
The Next Generation: Creating Justice in the Global Village

International Ministries (IM) 2014 Cycle Awardees

1. AB International Ministries/Universidad Biblica Latino Americana
Conference for Baptist Theological Education in Latin America & Caribbean
2. Convention of Philippines Baptist Churches (CPBC)
CPBC & ABC Roundtable Conference
3. AB International Ministries
Empower Macau Youth
4. AB International Ministries/ Baptist Seminary of Mexico
Empowering Partners in Mexico
5. AB International Ministries
Enable Special Assistants to Serve Overseas Partners
6. Evangelical Free Baptist Church of Burundi - EBLB
Equipping a Repurposed Healthcare Center
7. Council of Baptist Churches in North East India (CBCNEI)
Establish North East Christian University (NECU)
8. Moscow Protestant Chaplaincy (MPC)
Healing Moscow's Marginalized: The MPC Parish Center
9. AB International Ministries
Pilot Intern Program for Young Adults
10. AB International Ministries/Primera Iglesia Bautista de San Salvador
Formation of the Oscar Romero Mesoamerican & Caribbean Peace Institute
11. AB International Ministries
Training of Conflict Transformation Trainers (TCTT)



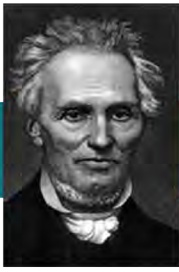
John Mason Peck Society

The *John Mason Peck Society* was established in 1996 as a way to acknowledge all those—past and present—who have worked with the Foundation to remember American Baptist ministry and mission in their charitable estate plans. This society's membership now numbers more than 680. However, many more people could become members of the Society since they have worked with the Foundation to name their church or an American Baptist organization in their wills or through other planned gifts. If that includes you, please contact the Foundation office by calling **(610)-768-2035** or by emailing **abfadmin@abc-usa.org**. Your membership may inspire others to consider making plans to do what you have been doing for years—supporting American Baptist outreach.

John Mason Peck Members (as of 2014)

Dr. Z. Allen and Conda Delite Abbott
Ralph and Bobbye Adkins
Paul D. Aita
Helen S. Akers
Rev. Paul and Marge Albrecht
Edna E. Alexander
Eugene and Ellen Allen
Jean and Bob Allen
Margaret C. Alsen
Magda Amargós
W. Haydn and Ione Ambrose
David and Myrtle Anders
David and Donna Anderson
Eleanor P. Anderson
Charlie and Phyllis Angell
Rev. Victor G. Angulo
Fred A. Ansell
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Susan Austin
Walter and Helen Babcock
Irene Baker
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Ricky Barlow
James and Mary Helen Barnett
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Dr. Sam and Sharon Bates
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Mr. and Mrs. Orris Bemis
David and Karen Bennett
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Roy and Nell Bingman
Joanne F. Bishop
Russell and Violet Bishop
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Janet and Lewis T. Briggs
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Mabel I. Brockhoff
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Rev. Mason L. Brown
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John & Phyllis Ellis
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Allen and Lavina Epp
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Mr. Harold L. Gardner
Lester and Pearl Garner
David L. and Linda K. George
Graeme C. George
Louis A. George
Ellen M. Gezork
Ken Giacometto
Alice M. Giffin

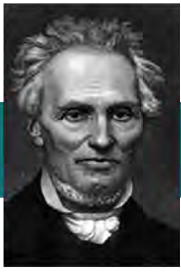
John Mason Peck Society



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Casey Gnage
Brian and Joyce Gongaware
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Phyllis Goodyear
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Geraldine Goss
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Marcia Patton
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Miriam Peterson
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W. Hubert and Frances B. Porter
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Margaret and Elmo Prine
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J. Steven and Marilyn B. Reynolds
John C. Reynolds
Ed and Pat Ritzler
Janet S. Roberts
Robert H. and M. Joan Roberts
Beth Rogers
Wayne Rogers
Adrian S. and Sharon S. Rogier
William and Amena Rosenberger
Marj Rosenblaum
Helen Rowe
Mrs. Rachel A. Ruiz
Rev. Raul A. Ruiz
Rev. Bud and Carol Russell
Heath and Betty Rutledge
Alois L. Rutz Rutz
John and Gladys Saint
Marjorie Salmassy
Anna F. Samples
Paul R. and Dorothy Santrock



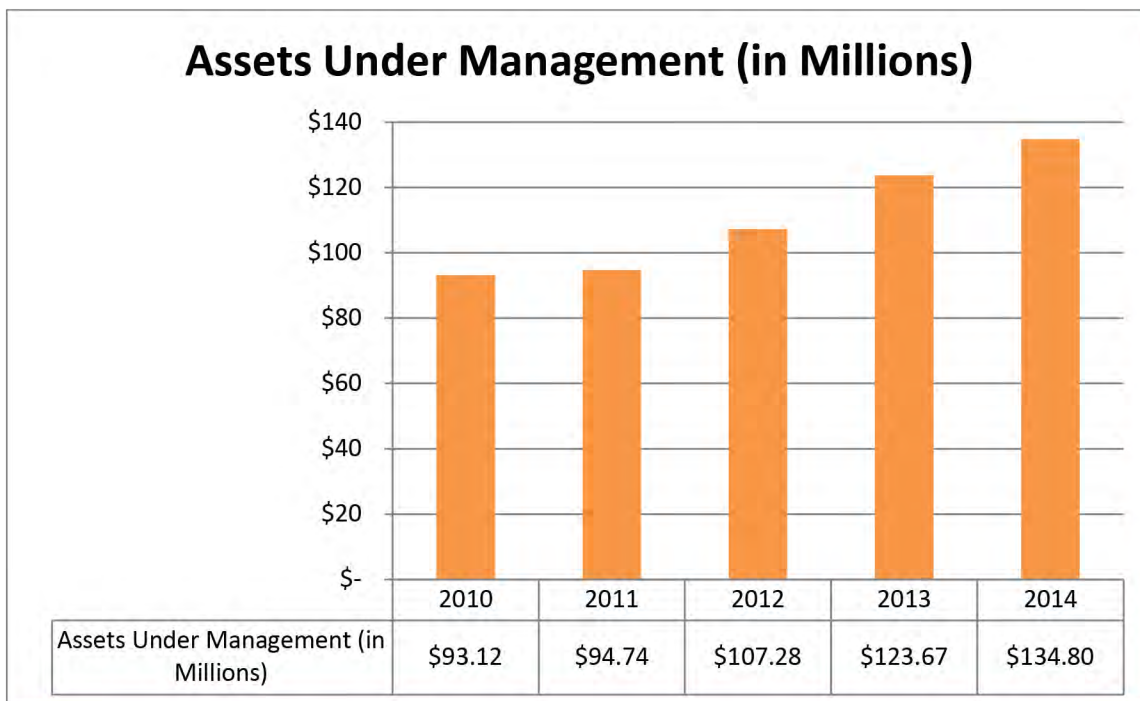
John Mason Peck Society

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Marshall and Donna D. Schirer
Rev. and Mrs. Ronald E. Schlosser
Mr. and Mrs. William D. Schneck
Rev. Harold and Estelle Schock
Ardina Schroeder
Chester and Dolores Scott
Claude and Elaine Scott
Gerald and Linda Seabaugh
Muriel V. Self
Leonard and Frances Selig
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Murray and Marjorie Sharp
Dr. and Mrs. Robert Shaw
Evelyn H. Sheffield
Ralph and Ruth Shenenberger
Peg and Don Sherman
Robby and Kris Brenneis Shortridge
Dr. and Mrs. Malcolm G. Shotwell
Thelma Sickles
Eleanor W. Siegrist
Rev. Perkin & Lisa Simpson
Wilbur Sittler
Stanley D. and Catherine S. Slade
Robert E. and Wilma E. Slaughter
Catherine B. Sloman
John W. (Jack) and Jean A. Smith
Sanford and Patricia Smith
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R. Wayne and Ardith M. Smith
Rev. Clayton F. Smith
William Vance Smith, Jr
Frances Sneller
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George and Ruth Spencer
Jeremy L. and Georgia S. Spencer
Lee and Lois Spitzer
Linda and Jerry Spoolstra
Tim and Pauline Spring
James O. Stallings
Rev. J. Claud Stewart II
Casselia Stewart
Charles and Margaret Stokes
Rev. and Mrs. E. K. Stratton
Rev. Jeffrey O. and Gayle E. Stratton
Lois Stratton
Alide H. Struze
Roscoe and Barbara Stuber
John A. and Carol I. Sundquist
Palmer and Helen Swenson
Rev. Cindy R. Swogger
Margaret R. Taber
Dennis and Linda Tanner
Norman and Carolyn Taylor
Clayton and Ellen Teague
Dr. Mary A. Thomas
Charles R. and Roberta J.W. Tidland
Mildred I. Tidrick
Walter and Ruth Tiedeman
Laverne D. and Dorothea A. Tierson
Olive M. Tiller
Ralph and Kathleen Tingley
Nicholas and Rachel Titus
Mary Ellen and L. Eugene Ton
Margaret and Gordon Torgersen
Rev. Rebecca Tornblom
Ms. Marjorie W. Towles
Harry K. and Juanita Townsley
John and Marilyn Trojak
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Dr. Reid S. and Janelle Losh Trulson
Donald and Phyllis Trump
Lily Chin Tu
Edwin H. and Rose W. Tuller
Rev. Dr. Darla Dee Turlington
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Everett and Doreen Ward
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Charlotte R. Weaver
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Violet M. and Max T. Wiant
Basil and Ruth Wilcox
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Rev. Dr. W. Kenneth Williams
Robert E. Williamson
Rev. Leonard Wilmot
Dr. Jane Gahs Wilson
Michael H. and Wilma S. Wilson
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Rev. Paul and Emid Winkler
Anna F. Wolfe
Curtis and Georgiana Jody Wolfe
Wallace D. and Margaret J. Wood
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Maurice Justin and Mary Frances Worley
Virginia A. Wormack
Mona E. Wright
Jean M. Wylie
Donald B. and Sharon K. Young
Nancy Jane Young
Seth Young
George D. and Doris Anne Younger

Financial Summary

As of December 31, 2014 *American Baptist Foundation (ABF)* managed approximately \$134.8 million in assets, compared with \$123 million at the end of 2013. An eleven percent net growth is a measure of success, but more importantly, these are funds to be used for ministry and what is accomplished through ministry is the ultimate measure of success. During 2014, ABF distributed over \$7.7 million total to donors and ministry partners. These distributions have provided income to donors, funded grants, scholarships, administration, community outreach, missions and so much more. For this, ABF is truly grateful.

The following provides detail of these funds as ABF enters its 30th year of ministry in 2015.

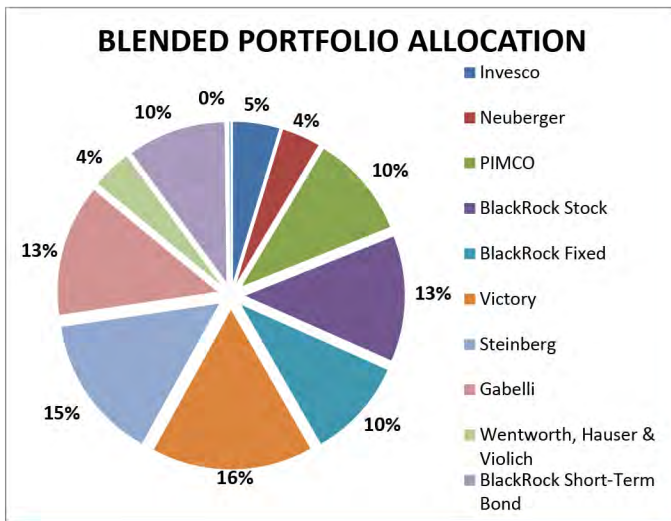


Investments and Endowments

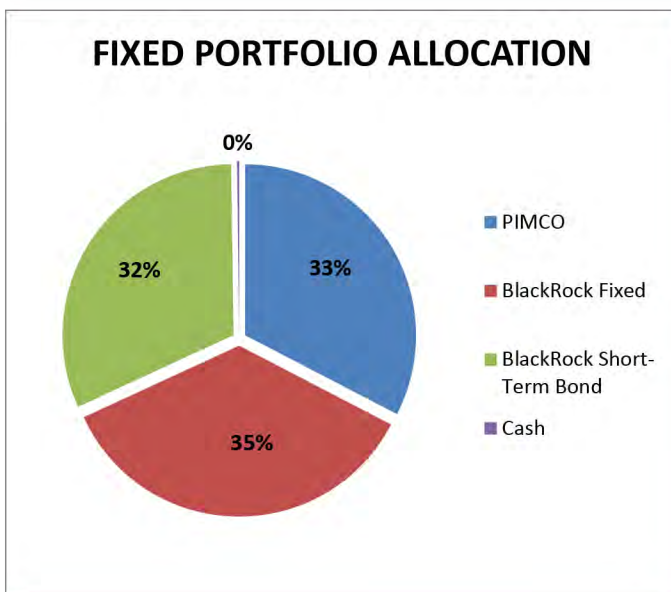
Assets managed under the Foundation's Investment and Endowment Fund platforms are comprised of custodial funds held on behalf of our partners and endowments created by our donors or established by ministry partners. 2014 started with \$84.68 million and ended with \$94.79 million, representing an 11.9% net increase. Income distributions to ministry partners from the fund totaled \$5.26 million during the year.

During 2014, over \$9.6 million in new contributions were added, including 38 new agreements. To illustrate, 349 total accounts were managed under this platform at the end of the year, representing a net increase of 8.7% over the 321 managed at the end of 2013. ABF's investment and endowment platform comprises of three professionally active managed investment options – the *Blended, Fixed and Stock Portfolios*.

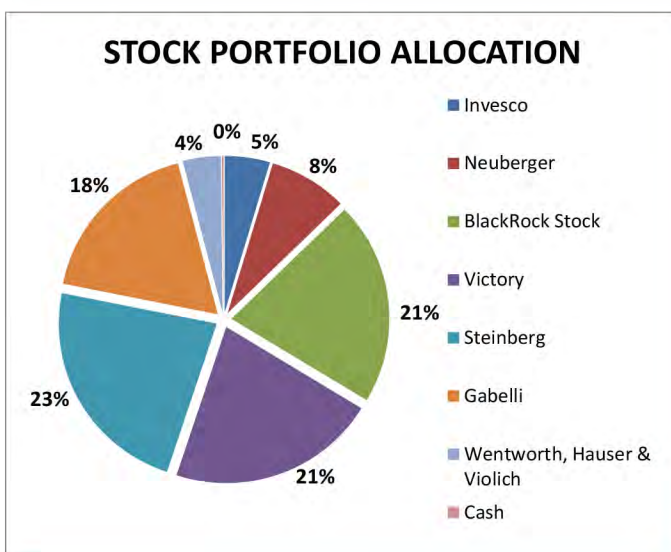
Financial Summary



Blended Portfolio – this is a balanced portfolio with a target allocation of sixty percent (60%) stock and forty percent (40%) fixed income. With over \$80 million, this portfolio represents ninety percent (90%) of the investments held and is suitable for the investor who desires moderate risk and growth.



Fixed Portfolio – this portfolio contains all fixed income investments. It has the potential for conservative growth and is ideal for investments with a short-medium time horizon. This portfolio is suitable for the risk-averse investor and



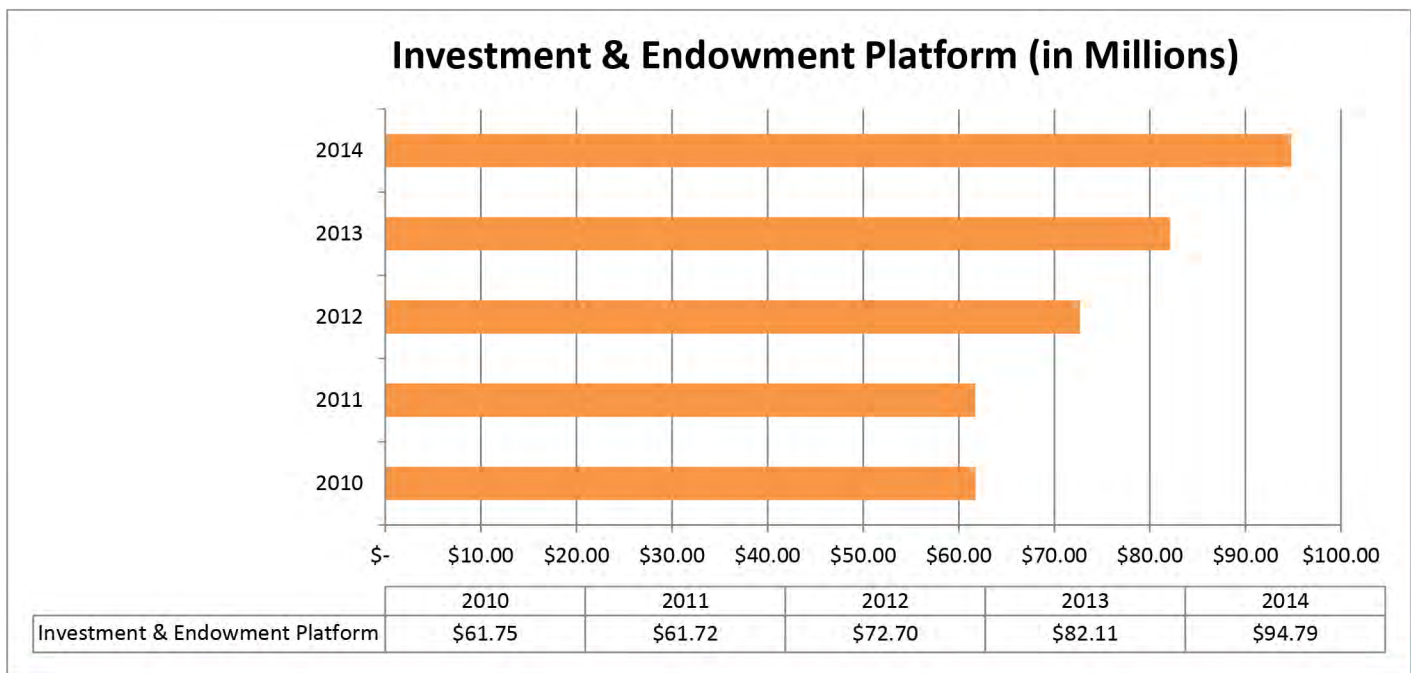
Stock Portfolio – this portfolio is comprised of all equities (stocks) and is suitable for an investor with greater risk tolerance. This portfolio has the potential for the greatest growth among the three choices.

Financial Summary

All three portfolios ended the year in positive territory but did trail their associated benchmarks*:

- The Fixed Fund ended the year up 3.33%, compared to its benchmark 3.12%.
- The Stock ended the year up 3.85% compared to its benchmark of 6.15%.
- The Blended Fund ended the year up 4.04% compared to its benchmark of 4.94%.

*The benchmarks used for the following funds are: Blended ABF Global Policy (40% Fixed/60% Stock). Fixed Barclays Intermediate Government Credit, and Stock S&P 500(42%)/Russell 2500 (25%)/ MSCI AC World (33%).



Trailing equity performance resulted from the strong performance of the S&P 500 benchmark, which represents the largest 500 companies in the United States. ABF's equity allocations are broader in scope and include small-cap, mid-cap and international exposure. These sectors did not perform as well as the S&P 500 during 2014. ABF's Finance committee and Advisors from the MER anticipate interest rate increases in the near future. As such, the duration of our fixed income holdings are strategically shorter than those of the Barclay's US Aggregate benchmark. This will position the Fixed Portfolio well for the long-term.

Life Income Agreements

Charitable life income agreements allow donors to establish gifts that pay income to them or their loved ones for a specified period of time, usually life, with the final value at maturity endowed or distributed to ministry for similar purposes. Charitable Remainder Trusts and Charitable Gift Annuities comprise the majority of these agreements managed by ABF.

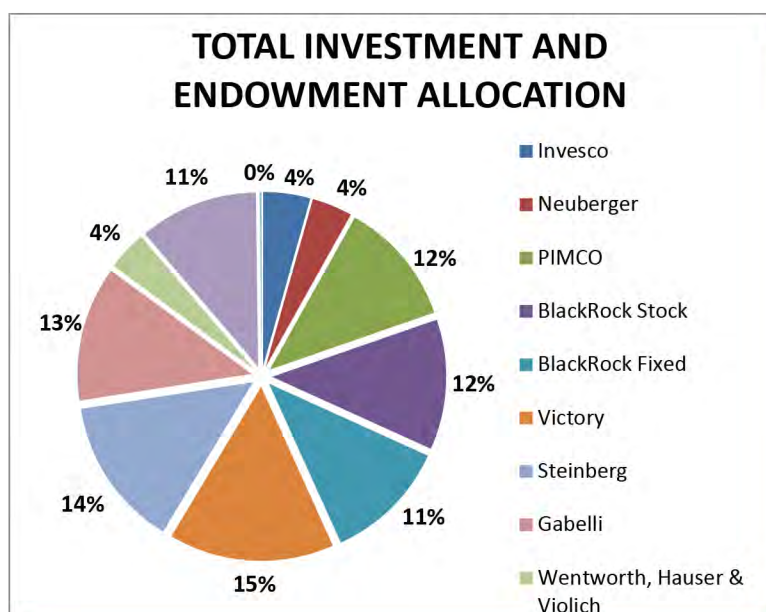
Financial Summary

Charitable Remainder Trusts (CRTs)

ABF ended 2014 with 100 active CRTs totaling \$27.9 million in assets. Additionally, there are 18 testamentary trusts that will be funded through estate plans in the future. Each trust is unique, balancing the needs of the donor with their philanthropic intent as allowed by IRS regulations. Most trusts share ownership in two pooled investments; the Mutual Fund and the Bond Fund common trust funds. These funds had an annual net return of 7.46% and 3.54% respectively. Income distributions to donors totaled \$1.49 million and \$1.23 million was distributed for charitable purposes from matured agreements.

Charitable Gift Annuities (CGAs)

There were 445 active CGA agreements at the end of 2014, with a very healthy \$5.92 million held in reserves to ensure that income payments and final distributions from matured annuities are made. Annuity investments are pooled and managed in a moderately conservative fashion to comply with various state insurance and regulatory guidelines. During the year, \$609,591 was distributed in income and \$145,804 was paid as final distributions to charity from matured annuities.



ABF is pleased to provide a wide variety of investment and planned giving services and resources for our members and broader ABC family. We are devoted to maximizing these resources available to meet the goals of our donors and institutions, we look forward to strengthening existing relationships and developing new ones.

The Foundation

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Rick Barlow

Development Consultant



Mary-Jo Bernhard

Endowment & Trust Manager



Joseph Huse

Development Consultatnt



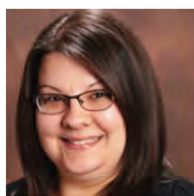
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