

# Generous LIVING

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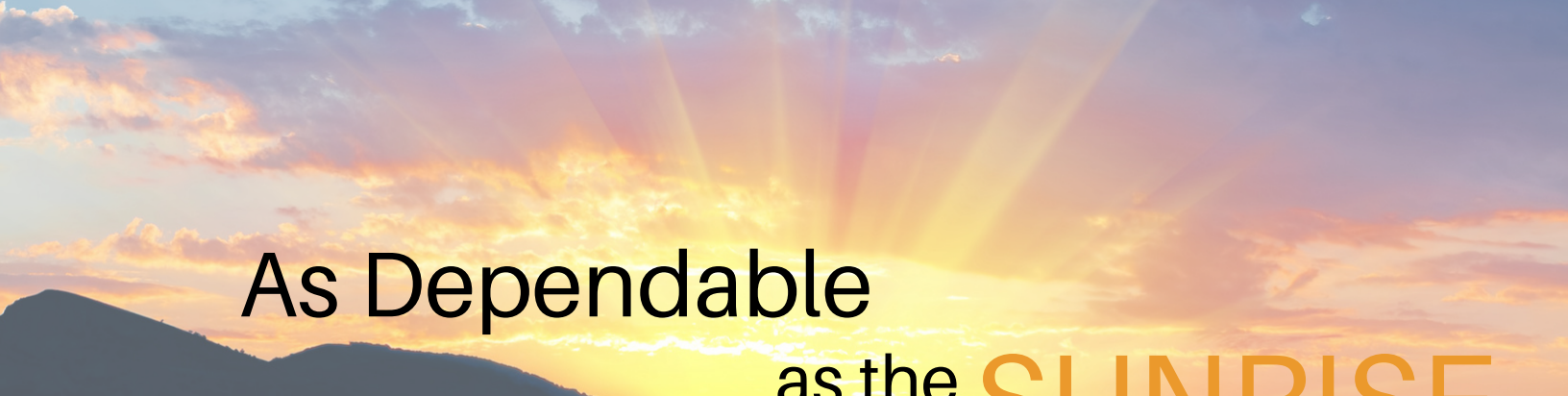
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## Let the **SUNSHINE** In

In 1969, The 5th Dimension sang “Let the Sunshine In.” After a year and a half of living with Covid restrictions, getting the vaccine is like letting the sunshine in. To sit with friends and see their faces is truly a gift. Who would have thought just two short years ago, that seeing a smile would bring such joy? Yet many of us know people who have died or who have prolonged after effects of the Covid virus. That grief and pain lingers for many.

But even through that pain, the steadfast love of God, like the sunshine, reminds us that there is a new day, and an opportunity to be grateful. St. Paul reminds us in his letter to the Philippians to give thanks in all things, and that our strength comes through Christ Jesus. As people of faith, we live in hope, in the “Son”shine, even when we are grieving.

Enjoying the springtime and summer sunshine is a gift from our creator God. We are filled with gratitude for every new day and have a deeper appreciation for the simple things; like seeing the faces of our friends and family. We give thanks out of our humility and deep gratitude. It rekindles the fire of our generosity for God and our faith communities that were always with us during the time of Covid. For even in the darkest of days, we were able to let the “Son”shine in.



# As Dependable as the **SUNRISE**

There are few things in life as dependable as the sunrise. Did you know the Foundation offers you something that may be just as reliable and can give you benefits today, tomorrow and for the rest of your life? Let's shed some light on the amazing benefits of a charitable gift annuity. Like the sunrise each morning, your gift annuity payments will return to you day after day, year after year... for your whole life!



## **Here's How it Works:**

- You fund a gift annuity by giving cash or transferring stock to us.
- We pay you back at a high fixed annual rate of your funding amount.
- You receive an income tax deduction this year.
- If funded with stock, you also receive a capital gains benefit.
- Your church benefits from a future gift.

***The payment you receive will never change regardless of what the economy does, or how long you live.***

Want some extra warmth with your gift annuity? Add a spouse or friend when you fund it, and the two-person beneficiary payment will continue as long as either of you live. If you want a higher rate, you can delay the first payment and a great payment rate becomes even greater.

If your life could use a little more sunshine, contact us to learn how a gift annuity can fit into your plans. We can give you your exact payment rate and tax benefits with no obligation and, of course, at no cost to you.

You can't beat the  
predictable, reliable  
benefits of a gift  
annuity.

*Would you like more income  
tax reliability this year?*

**ASK US...**



# SUNSHINE

## for Every Season

The sun will rise 365 times this year. Each sunrise will be different but also the same. Some of those days will be holidays. Some, birthdays. Others will be spent with friends, and some may be on a vacation. Yet it is always the same sun, always there to provide warmth and light.

*As predictable as the sun rising, a good estate plan is there for you every day, ready for whatever happens.*



If you do not have an estate plan, or it's been a few years since you've looked at the one you have, consider the benefits that come from having a well-thought-out current plan:

- *You provide for your spouse, family and loved ones.*
- *You manage your hard-earned assets rather than them managing you.*
- *You maximize tax savings so you can direct more to those you love.*

Best of all, when you have a plan, you have one thing that is as dependable as the sun climbing on the horizon: peace of mind. You can go to bed every night knowing you are prepared and no matter what happens, your plan will carry out your wishes tomorrow.

We have a free planning guide that will give you a great start on creating or revising your plan. Enjoy the reliable, predictable peace of mind you so richly deserve. Don't be like so many who prefer to live in the dark and never plan.



**Don't leave your family in the dark. Give them and you the light and comfort that comes from having a plan!**

# PHILANTHROPY

## *a Family Tradition*



On a warm spring morning, I had the pleasure of interviewing mother, Sandra Lackore, and daughter, Kristine Owen. Our conversation was both enlightening and inspiring. Sandra was an early supporter of the Foundation and its ministry. Kristine has followed in her mother's footsteps and serves on the Foundation's Board of Directors, where her business acumen and love for the church provide the gifts of oversight and leadership. Our conversation began with the question:

### *What are the motivations and factors that influence your philanthropy?*

**SANDRA:** "For me it has to touch my heart, it is a part of my being. For example, our gift to Camp Aldersgate. Cecil and I established the endowment to benefit Camp Aldersgate with the cash gifts from our wedding. We added to the Fund with a memorial gift after the death of our daughter Jennifer. Giving is about what makes a difference in life, and the world around us."

**KRISTINE:** "I think that when my husband Jonathan and I give, it is to large charities that we know will use the funds responsibly, like Feeding America or the Red Cross. We use Charity Navigator to keep tabs on charities, to see where they are making a difference. We also give to those local charities that touch our heart, like the local food pantry serving the homeless. We like to hear the stories of people being helped and how the charities are making an impact in people's lives. It is a heart decision for local charities and a head decision for larger charities. We like to give globally and locally, and to hear the stories of how we are able to help make a difference in the world through our gifts."

### *How has generosity impacted your life?*

**SANDRA:** "I think we are unique. My husband Cecil is a fundraiser. He and I met at a meeting of the United Methodist Foundation Directors. Bishop Herbert Skeete asked me to attend the conference to find out more about starting a Foundation in New England. In addition to the religious community, I feel we have a responsibility to give back. Kristine has seen this. When she, and Jennifer, too, were given their allowance, they were taught to set aside a portion to bring to church for the offertory. Education is also very important to me, and I belong to two women's groups that just voted to give \$211,000 in scholarships through the Arizona Community Foundation. I think Kristine has seen this, it is part of the fabric of my being to be involved in, and give to, organizations that give back and move people forward."



**KRISTINE:** “I think it is very important to hear what our faith says about giving our time, talent, and treasure. And I think by volunteering you can see people at work, and your desire to help fund that work can come from the volunteering experience. My giving experience includes volunteering at Camp Aldersgate, giving time as a young person, and now being older, with less time, being able to support them with our funds. So, too, with the Appalachian Service Project, we volunteer as we have time, but we also give of our gifts as we are able. I think the same thing happens when people volunteer with the Food Pantry – as youth, as children, as families, they understand the need. And, if you don’t have time to give, you can give from what you have been blessed with as financial resources. I think that carries through generationally. As young people, they give that quarter to the offering plate or they sort cans; as they grow older, they realize how much it means for themselves and others to give of yourself, whether it is time, or money, or prayers, or presence.”

### *How are philanthropic decisions made in your family? Does one person take the lead?*

**SANDRA:** “No one takes the lead in our house. We make all those decisions together in our house. I had just completed my tenure as president of the East Mesa Branch of the American Association of University Women (AAUW), and the usual thing was that the outgoing President would give a small token gift to each officer. I don’t need stuff; I don’t think other people need stuff at our age. So, we made a fairly substantial contribution to the AAUW in honor of these women. Now, I talked to Cecil about this gift, but in my mind, I was thinking that the letter accompanying the gift would be read at the meeting, so everyone will know why I did it and the values it represented. When we had our last meeting, instead of giving me a pin, they donated to our church in my name. So, it’s the example we set, and I am intentional about setting that example, and Cecil is too.”

**KRISTINE:** “For us, it is a combination of both. We have conversations at giving time which is at the end of the year for our larger donations. And then there are other times when one of us sees a need, and we have been together long enough that we don’t have to check in about those gifts. We have been blessed and are comfortable talking with our family about money and giving. Sandi will call to challenge us on a \$100 gift, or to have a conversation to not give her Mother’s Day presents and let’s support this or that instead. Being comfortable having these conversations is not a taboo subject for us. Giving of your time volunteering is also part our philanthropy. Serving on a board that meets four times a year can be a boon for that organization when you share your gifts of time and talent.”



### *Other than your family, who were the people that influenced your philanthropy?*

**SANDRA:** “At our home church there was a pastor, Richard Colby, long dead now, who was a role model for me. What I learned from that relationship with him was that when you accept that “modeling” from someone, they know it – and it feeds them too. I was the new Conference treasurer when Dick Colby’s wife died, and he asked me to do a eulogy at his wife’s funeral. And what that said to me was the modeling was a two-way street. He realized that his modeling for me made me a stronger person, and that had given him great satisfaction.”

**KRISTINE:** “I think working at Camp Aldersgate as a camp counselor and later as a staff person taught me lessons in philanthropy. We knew that kids were able to come because of camp scholarships; we received supplies, even a new camp truck because people supported us. We were told that we have 10 kids coming on scholarship this week, or that someone donated a piece of equipment. We didn’t know who the kids were, but we knew people had given money so that they could attend camp. And we did not know who the donors were, but we were made aware of their generosity so that we knew we were special to people beyond the kids that were coming and the parents who were sending their kids to camp. We felt like we were part of a legacy preserving a sacred space and the programs

that served kids. I was heavily involved in our church's \$2.9 million capital campaign at First UMC Westborough. At this time, Nelson Ball and Earl Hutt were mentors and role models for me. I was blessed to have their support and guidance."

At this point Sandra added to the story. During the campaign, Nelson Ball met with Sandra and Cecil over lunch. He asked, "Beyond fundraising, what do we need to accomplish in this campaign?" Sandra shared that they needed to train Kristine and Jonathan to take his place. Kristine, obviously touched by the story said, "Jonathan is well aware that the pillars of the church are aging, and that people are going to have to step-up to take their places. I think we have a responsibility to mentor young adults just as Nelson and Earl have been mentors for us."

### ***Which gifts brought the most satisfaction, and are there any that brought you joy?***

**SANDRA:** "One of the gifts that brought me the most joy was the \$100,000 gift that we gave to Camp Aldersgate. And then going to Florida to meet with Rev. Bob Fishel and his wife Judy to ask them if they would match it, and within 24 hours having them say yes. Having someone have enough trust and confidence in your decision and being willing to share what you are doing so that it motivates other people gives me huge satisfaction. Having Bob and Judy Fishel match that gift was one of the greatest compliments that I ever had in my life."

*I see generosity as a two-way bridge, connecting people who are healthy and sick, wealthy and poor, broken and whole. On that bridge, we encounter Christ, receiving more than what we give, and more than what we are seeking.*

**KRISTINE:** "For me, it was being part of something bigger; by that I mean, with the Camp Aldersgate Capital Campaign we were able to accomplish a purchase of land that no one individually could have done. It was being able to give and call others to give. It was the same with the church campaign. For me, it was most satisfying to give and see the community coming together, to rally each other to give their money and their time to accomplish something for the greater glory of God and the needs of the people."

The last question I asked concerned connecting generosity to the spiritual journey. Sandra likened it to the fabric of her life; her spiritual journey intertwined with her journey with people. She painted a picture of an old patchwork quilt full of life experiences and faith, stitched together to provide strength and sustenance no matter what comes our way. Kristine presented a circular dynamic of a church community. A family where you are comfortable offering help and giving when times are good but also being able to ask for help during difficult times. Sandra and Kristine experienced the generosity of others during what they called their "horrible" year as a family. During the course of one year, Kristine's first marriage ended, and Sandra's husband Cecil was diagnosed with cancer. Daughter and sister Jennifer died at age 33, Sandra's mother died, and a sister-in-law died that same year. They were held tight in that patchwork quilt of the faith community, and it became the arms of Christ during their time of loss, grief, and pain.

Listening to Sandra and Kristine, I see generosity as a two-way bridge, connecting people who are healthy and sick, wealthy and poor, broken and whole. On that bridge, we encounter Christ, receiving more than what we give, and more than what we are seeking.







What a

# Beautiful Day

If you have done well in the stock market, then you might be considering the tax impact of selling your stock.

***Keep the good feeling going by never selling your stock!***

Instead, transfer it to a charitable gift annuity or to a Donor Advised Fund at the Foundation. You receive the benefit of the current value of the stock but also receive income tax and capital gains benefits. You should also consider making all your charitable gifts with stock, rather than cash, for the same reasons.

***Ask how we can help you have a beautiful day!***



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