

New Beginnings

2018 Annual Report

Dear Friends and Colleagues,

As I get ready to retire as Executive Director of the California Nevada United Methodist Foundation after 10 wonderful years, I have been blessed to have had many great experiences and joyous moments. I have learned so much from you and gained more than I can express both professionally and personally.

During my tenure, I have enjoyed meeting and assisting pastors and laity across California and Nevada. During this time, the Foundation has grown from \$31.5 million to over \$70 million in assets under management. I have had the privilege of assisting many congregations in our annual conference with legacy planning seminars, investment management services, endowment development and capital campaigns. Each and every church relationship has enriched my life.

To our stellar Board of Directors, thank you for your ongoing support and enthusiasm. And especially to my exceptional team – Cheri Kraus and Angela Slaton – I am especially grateful for your years of collaborative excellence. I will truly miss all of you!

I'm excited to leave the Foundation in the capable hands of David Malloy. I hope you will all get to know him, and I know that you will welcome him warmly!

As I look forward to more Grandma time, I thank you all for the years of friendship and fellowship.

Grace and Peace,



Susan Peters



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Resources, Relationships, Results



To everything there is a season,
a time for every purpose under heaven.
Ecclesiastes 3:1



CA-NV United Methodist Foundation Hires New Executive Director

The Foundation Board of Directors is excited to announce that David Malloy is the newly elected Executive Director of the California-Nevada United Methodist Foundation. The California-Nevada United Methodist Foundation serves individuals, local church congregations and conference agencies through professional, socially responsible investment of endowment and other funds for local churches and church agencies, and legacy giving education and guidance for congregations and individuals.

Malloy comes to the Foundation after serving for 10 years in the Office of Development with the General Board of Global Ministries. In his work with Global Ministries, Malloy worked as the Director of Annual Conference Relationships, communicating the work of the mission agency to the 59 annual conferences of the United Methodist Church.

He cultivated opportunities in designated giving, fundraising for the mission agency's over 900 projects and 350 missionaries in 65 countries. Malloy helped develop partnerships among annual conferences and churches with the mission agency's projects, relief work and missionaries. Malloy also coordinated trainings and presentations to equip church leadership with information on giving opportunities, donation data and project impact. Malloy has worked extensively throughout Africa including Sudan, Uganda, Mozambique and Liberia. He has also worked in Mexico, China and South Korea.

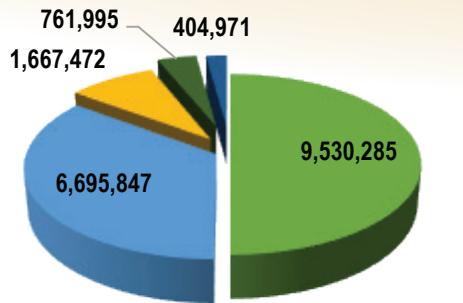
Malloy previously served for four years as the Director of Communications for the Greater New Jersey Conference. In 2006, he served a two-year term as president of the United Methodist Association of Communicators. Before working in New Jersey, David was the fifth recipient of the Judith L. Weidman Fellowship sponsored by United Methodist Communications. The year-long fellowship is intended to prepare young people for careers in religion communication and he worked in the West Ohio Conference communications office.

Malloy is a fourth generation United Methodist and the product of a North Carolina Conference parsonage where he was taught the value of service in the church. David is a graduate of the University of North Carolina at Pembroke with a bachelor's degree in communications with a public relations concentration. In 2015 he received a master's degree in Fundraising and Non-Profit Management from Columbia University.

David and his wife Summer are expecting their first child, a baby boy, in December.

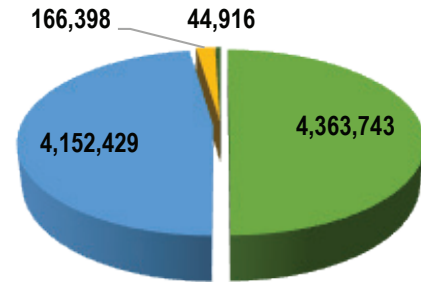
David will serve as Executive Director Elect from November 1st to December 31st alongside current Executive Director Susan Peters, who is retiring at the end of this year after 10 years of service. Susan, Cheri Kraus and Angela Slaton will provide for a smooth transition to our new leadership and are excited to welcome David and his family to our California-Nevada UM family!

2018 FINANCIAL INFORMATION



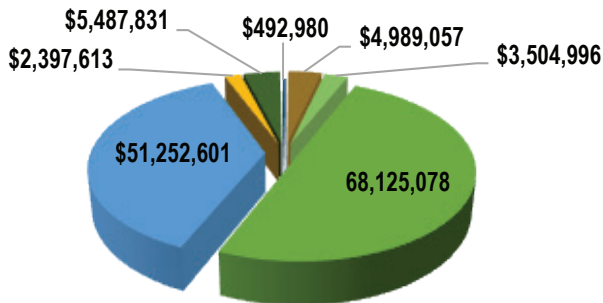
Income Received 2018:

- Deposits to new & existing accounts
- Income Earned on Investments
- Realized Gains/(Losses)
- Fund Management Fees



Funds Distributed 2018:

- Church Conference & Other Ministries
- Life Income Payments to Donors
- Grants & Scholarships



Funds Held by the Foundation 2018 Market Value:

- Revocable Trusts
- Operations
- Charitable Remainder Trusts
- Pooled Income Funds & Gift Annuities
- Irrevocable Trusts & Donor Advised Funds
- Restricted Gifts

Assets Under Management as of Dec. 31, 2018: \$68,125,078

New Money Received in 2018: \$9,530,285

Investment Performance in 2018:

Equity Portfolio -6.82%

S&P 500 Benchmark -4.39%

Asset Allocation Portfolio -4.46%

Blended Benchmark -2.35%

Intermediate Fixed Income Portfolio 1.10%

Benchmark .88%

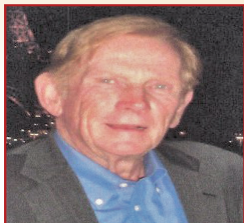
Operating expense ratio: .69% of AUM



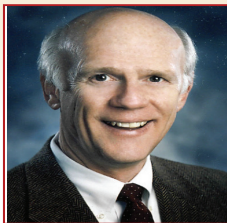
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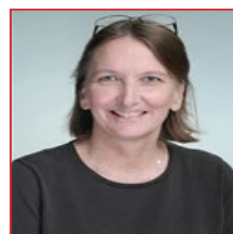
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