

ST. MATTHEW'S UNITED METHODIST CHURCH
ENDOWMENT PROGRAM
DONOR BILL OF RIGHTS

The *Endowment Program of St. Matthew's United Methodist Church* exists for the purpose of providing members and friends the opportunity to make charitable gifts that will become a permanent endowment of financial support 1) to strengthen, expand, and preserve the mission and ministry of St. Matthews and 2) to establish a permanent, living memorial honoring the donor and/or their designee.

The Endowment Program is administered by the *Permanent Endowment and Planned Giving Committee* which is composed of Church members. The Committee has established this ***Donor Bill of Rights*** to ensure that members and friends who wish to make charitable gifts can be confident that those gifts are administered according to the terms of *Endowment Program Charter* and used only for the purposes specified by the donor.

All donors to the Endowment Program shall have the following rights:

- 1) To have access to those documents which establish and direct the management of the Endowment Program, including any revisions that may be approved by the relevant Church body.
- 2) To be informed of the mission of the Endowment Program, the way the Endowment Committee intends to manage and use charitable gifts to the Endowment Program, and the capacity of the Endowment Committee to manage and use both the gifts and earnings from investments effectively and for their intended purposes.
- 3) To be informed of the identity of those serving on the Endowment Committee and to expect the Committee to exercise prudent judgment in fulfilling its each of its stewardship responsibilities.
- 4) To have access to any financial statement and/or annual report of the Endowment Program for at least the most recent prior three years.
- 5) To be assured that any gift to the Endowment Program will be used solely for the purpose(s) for which they were given and in accordance to the terms of the *Endowment Program Charter* and any *Memorandum of Understanding* established between the donor and St. Matthews at the time the gift was made.
- 6) To receive appropriate acknowledgement and recognition, consistent with the donor's individual desires
- 7) To be assured that all information relating to any gift to the Endowment Program is handled with respect and with confidentiality to the extent provided by law.
- 8) To expect that all relationships between members of the Endowment Committee and the donor, their legal representative(s), and/or their designated financial/ legal advisor(s) will be professional in nature.
- 9) To be assured that those seeking donations to the Endowment Program are volunteers or friends serving the best interests of the Endowment Program and shall not be hired solicitors.
- 10) To be confident that any list of donor names maintained by the Endowment Committee will not be shared outside the Committee.
- 11) To feel free to ask questions and to receive prompt, truthful and forthright answers relating to any charitable gift to the Endowment Program the donor may be considering or may have already provided.