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Now That's a Sermon!

Successful Engineer Remembers Preacher's Words 66 Years Later

Don Clayton attended church on most Sundays as a kid, sitting in the back pew of the Lake Arthur United Methodist Church with his buddies. Sometimes they listened to the sermon, sometimes they didn't. But there was one sermon that Clayton never forgot, even after 66 years.

Rev. Robert M. Brown was the preacher at the time and his stewardship message on this particular day got Clayton's attention. The pastor talked about a successful engineer and inventor, R.G. LeTourneau from Mississippi, who developed a construction engineering corporation. LeTourneau gave an endowment to his church under one condition: that the Bishop would be at the congregational meeting when the endowment was announced.

The story made Clayton consider engineering as his own vocation. He admired the act of giving a significant gift and the idea of meeting the Bishop, and thought to himself, "I want to do that." He never forgot the message that day.

Clayton graduated in petroleum engineering from LSU in 1959 and began his career as a production engineer. He advanced through the ranks and became remarkably successful. He was the head of several oil companies. He patented procedures and equipment used in the oil and gas industry and became an industry-recognized pioneer in the field. He was elected to the LSU College of Engineering's 1992-1993 Hall of Distinction for his distinguished professional achievement,



L to R: Bishop Cynthia Fierro Harvey, Don Clayton and Rob Fairly at the Foundation's 2017 Annual Meeting

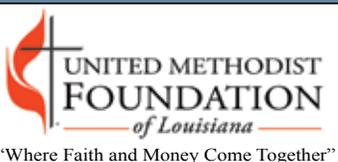
and in 2006 he was inducted into the LSU Alumni Association Hall of Distinction for his significant contributions to society.

He and his wife Gloria have funded the Donald W. Clayton Graduate Program in Engineering Science at LSU and provided the LSU College of Engineering with a state-of-the-art multimedia center dubbed the Donald W. Clayton Excellence Conference Center.

Last year, 66 years after hearing Rev. Brown's stewardship sermon, Clayton was again motivated as he happened to recall the pastor's words. He called Bishop Cynthia Fierro Harvey and began the process of setting up an endowment for Lake Arthur UMC on one condition: that the Bishop attend the congregational meeting when the endowment was announced.

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The Bishop was glad to visit Lake Arthur United Methodist Church, and with the help of the United Methodist Foundation of Louisiana, the endowment was set up in a few days.

Clayton's gift will help provide a full time minister for the Lake Arthur UMC congregation—someone to take care of the senior citizens and get the youth group active again, among other things. There is also a rainy day fund for incidentals.

After the endowment was created, Clayton realized the church needed a parsonage that would accommodate a pastor and family. So he donated the money to build a 2000 square foot, Acadian style four-bedroom home.



Teenager Don Clayton grew up living across the street from Lake Arthur UMC, where he mowed the grass and did other chores for the pastor.

"Without the support and teachings of the Lake Arthur Church, I would not have enjoyed the success I have enjoyed in the oil and gas industry. It's important to give back to the church because somebody gave to the church that gave me all the opportunities that I had. I want others to have that," claimed Clayton.

What will your story be?



Cheri Ben-lesau of Munholland UMC, Metairie, used a rental house to fund a **Charitable Remainder Trust**. She no longer worries about tenants, property taxes or insurance payments, didn't

pay capital gains on recaptured depreciation, enjoyed a substantial tax deduction, locked in 7% income and provided for the future of the Louisiana Methodist Children's Home.

A.B. Clark of Broadmoor United Methodist Church in Baton Rouge used proceeds from U.S. Savings Bonds to fund several **Charitable Gift Annuities**,

locking in a blended income rate of 8% for life. In addition to the lifetime income, she is supporting her three favorite United Methodist ministries forever.



Rev. Weldon Bares, senior pastor of First United Methodist Church in Lake Charles, appreciates the blessings he's received from each of the five churches he has served.

His **will** provides for each of those churches, his seminary, Asbury and the United Methodist Foundation of Louisiana, where he currently serves as vice-chair of the board.



Marjorie Miller was the librarian at Southeastern Louisiana University and lived in the house her father built with lumber he milled himself. Her **life estate gift**

of the house allowed her an immediate income tax deduction and to leave a legacy to her church, First UMC of Hammond, all while continuing to live in the house.



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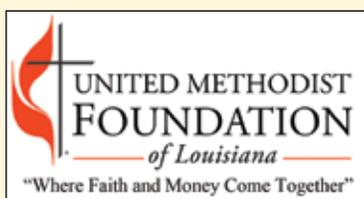
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Let us help you
write your own story

SAVVY LIVING

Financial Caregiving: How to Help Relatives with their Finances

Dear Savvy Living,

Can you offer any tips on helping an elderly parent with her finances? My dad always handled the money when he was alive, but since he passed away last year, my mom has struggled to keep up.



Millions of adult children today serve as financial caregivers to their ill or elderly parents or other loved ones. Being a financial caregiver involves providing services like paying bills, handling deposits and investments, filing insurance claims, preparing taxes and more. Here are some tips and resources that can help.

Have the Talk

The first step in helping your mom is to have a thoughtful talk with her, expressing your concerns and offering your help in simplifying her financial life. You might want to get your siblings or other family members on board to help make your case, so your mom will know everyone is on board.

Get Organized

If OK with Mom, your first order of business is to get organized. Make a list of all her financial accounts and make copies of her important documents to help you understand her overall financial situation. Your list should include her:

- Monthly bills: Phone, cable, water, trash, gas, electric, credit-card accounts, etc.

- Bank accounts: Checking, savings and safe-deposit boxes.
- Retirement accounts: Social Security, pensions, IRAs and 401(k)s.
- Brokerage accounts and investments.
- Insurance policies: Life, home, auto, long-term care, Medicare, etc.
- Important documents: Will, advanced medical directive and durable power of attorney. Make sure these documents are prepared.
- Taxes: Copies of your parents' income tax returns over the past few years.
- Contact list: Names and phone numbers of key contacts, including insurance agents, financial advisor, tax preparer, family attorney, etc.

Simplify

You can simplify your mom's monthly financial chores by setting up automatic payments for her routine bills and arrange for direct deposits (see godirect.org) of her Social Security, pensions and other income sources. Have her

bank and other statements mailed directly to you so you can monitor the activity. Consider online bill paying through your mom's bank, if available.

Meet With a Pro

Depending on the complexity of your mom's assets, both of you should sit down with your family financial advisor to review her investments and financial situation. If you don't have one, find a reputable, fee-only financial planner who can help you put a smart plan in place. Fee-only planners typically charge an hourly fee, which can be around \$200 to \$300 an hour. To locate one, see napfa.org.

Hire a Money Manager

If you need some help, consider hiring a daily money manager. This is a trained professional who can come in once or twice a month to pay bills, make deposits, decipher health insurance statements and balance her checkbook. Costs range between \$25 and \$100 per hour. To locate one in your area, visit aadmm.com.

"Savvy Living" is written by Jim Miller, a regular contributor to the NBC Today Show and author of The Savvy Senior book.



“Where Faith and Money Come Together”

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A custom planned giving program for your church . . . and we pick up the tab!

Americans are making planned gifts. \$28 billion was gifted through charitable bequests in the U.S. in 2015. Are the members of your church making planned gifts?

The Foundation offers Planned Giving Navigator to churches to help create or jump-start custom planned giving initiatives in their congregations. Ten churches in our conference recently completed the one year program. As we start the second year, enrollment is open to your United Methodist church.

Navigator brings personalized guidance from experts to provide the tools and services churches need to create their own planned giving timeline, design and customize planned giving materials such as brochures, website and videos.

Veteran churches and Navigator staff will discuss the benefits and how to succeed in starting or continuing planned giving programs at a Round Table lunch on August 2 at the Foundation office. Stewardship leaders from any UMC interested in learning more are invited.

Veteran churches include Henning Memorial UMC of Sulphur, Broadmoor UMC of both Baton Rouge and Shreveport, First UMC of Natchitoches, First UMC of Denham Springs, First UMC of DeRidder, Noel Memorial UMC of Shreveport, Trinity UMC of Ruston, First UMC of Slidell, and First UMC of Monroe.

Rev. Terry Love, Pastor of Administration at Broadmoor UMC, Shreveport, said, “The Planned Giving Navigator staff has given a lot of insight into legacy giving and initiated some new thoughts in my mind. We’ve developed some very nice advertising pieces through the program.”

Churches invest about \$300 per year to participate, but are reimbursed when they meet participation requirements.

“It’s a custom planned giving program for your church, and we pick up the tab,” claimed Rob Fairly, President and CEO of the Foundation. “All churches should have a planned giving program, and Planned Giving Navigator guides them through each step, making it easy for them to do,” he said.

You’re invited!



**Design a custom
planned giving program
for your church!**

Planned Giving Navigator Round Table Lunch

Wednesday, August 2
11:00 a.m. - 1:00 p.m.

Foundation office
in Baton Rouge

Lunch included
RSVP by July 31
to kellyj@umf.org

No cost