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CHRISTIAN  
CHURCH  
FOUNDATION

*Helping Disciples Make a Difference*

2012

ANNUAL REPORT



Tall oaks, from little acorns grow



## JAMES P. JOHNSON STEWARDSHIP AWARD

The **James P. Johnson Stewardship Award**, created in 2003 in honor of Foundation President Emeritus James Johnson, recognizes a congregation of the Christian Church (Disciples of Christ) that has demonstrated leadership, creativity and integrity in answering God's call to faithful stewardship, including the faith discipline involved in the stewardship of accumulated resources.

Recipients have lived out a response to God's claim on our lives and our resources with a faithful commitment and enthusiastic joy.

This award is presented to congregational representatives at the Foundation's dinner at the biennial General Assembly of the Christian Church (Disciples of Christ). Nominations are provided by Foundation staff and members of the Board of Directors, and approved by the Board of Directors.

### PAST RECIPIENTS

2003 James P. Johnson

2005 Central Christian Church, Decatur, IL

2007 University Christian Church, Fort Worth, TX

2009 First Christian Church, Bowling Green, KY

2011 First Christian Church, North Hollywood, CA



*The Christian Church Foundation, Inc., is an integral part of the Christian Church (Disciples of Christ). It is included in the group listing of the General Assembly of the Christian Church (Disciples of Christ), Inc., which carries Tax Exemption Number 1125.*

*A listing of the General Assembly of the Christian Church (Disciples of Christ) is to be found on page 1235, Volume 2, of the CUMULATIVE LISTS OF ORGANIZATIONS Publication 78 (Rev. 9-2004), described in Section 170 (c) of the Internal Revenue Code of 1986.*

*The complete set of 2012 financial statements, audited by BKD, LLP, is available by calling the Foundation at (800) 668-8016 or by visiting our website, [www.christianchurchfoundation.org](http://www.christianchurchfoundation.org).*

# Our Mission

Our mission is to support and expand the ability of all Disciples ministries to worship, witness, and serve. We do this by identifying and resourcing donors who desire to make a difference through planned gifts, and by assisting Disciples ministries to be good stewards of their gifts through sound policies and prudent investment services.

# Our Core Values

## Integrity

Honesty, transparency, full disclosure and the ability to fulfill our commitments.

## Commitment to Excellence

Continually working to improve our services and processes and to be responsive to the needs of donors and our church.

## Stewardship

Serving as trustee for donor and church dollars with the same level of commitment and care that we would have for our own resources. Understanding our purpose for being as a ministry to serve and to benefit all of the ministries of the Christian Church (Disciples of Christ).

## Fiduciary Responsibility

Prudent and diligent oversight of funds under management. Commitment to treat each donor dollar as a sacred gift, requiring the highest level of care.

## Partnership

Working to support all of the ministries of the church. Serving as an honest broker to connect ministries and donors for the benefit of the Gospel.

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## from the President

Dear Friends,

In 1961, a handful of leaders in the Christian Church (Disciples of Christ) took action on a visionary idea: to create a foundation for Disciples that would encourage and steward planned gifts.

Twenty-five years later, in 1986, our denomination's first General Minister and President, Dr. A. Dale Fiers reflected on how that visionary idea had grown. As one who had participated in the establishment of the Foundation, Dr. Fiers recalled the words of poet David Everett, "Tall oaks from little acorns grow."

Declaring that "only God can make a tree," Dr. Fiers rejoiced in the Foundation's growth as a "strong, well-rooted oak — a foundation of worthy achievement, of praiseworthy growth and great promise." At the close of the Foundation's first 25 years of ministry, total assets of \$20.8 million were celebrated.

As I look back over 2012 and the years of growth to this point, I give thanks for those visionaries who planted the seed and for the many donors and ministry partners who, year after year, have continued to strengthen our ability to serve. I give thanks for God's abundance, shared through us to nurture and to grow new seeds of Christian witness that are being planted across the life of our church.

We conclude our 51st year looking back to measure our growth and, more importantly, looking forward — continuing to dream about

how our generation can continue to serve the various ministries of our church. Our mission is to steward this ministry in ways that will be ever more faithful to the Gospel, shared through the Christian Church (Disciples of Christ).

We made some important strides towards that goal in 2012. During the year, we received \$8.2 million in new permanent fund gifts and Disciples investors added \$29.4 million of new investments in our Joint Investment Trust. Those additions, coupled with robust investment performance, allowed the Foundation to pass a milestone in our growth, surpassing \$500 million in assets for the first time in our history. We celebrate this growth, believing that it allows us to be a stronger partner for each donor and each ministry partner who entrusts us to steward their faith legacy.

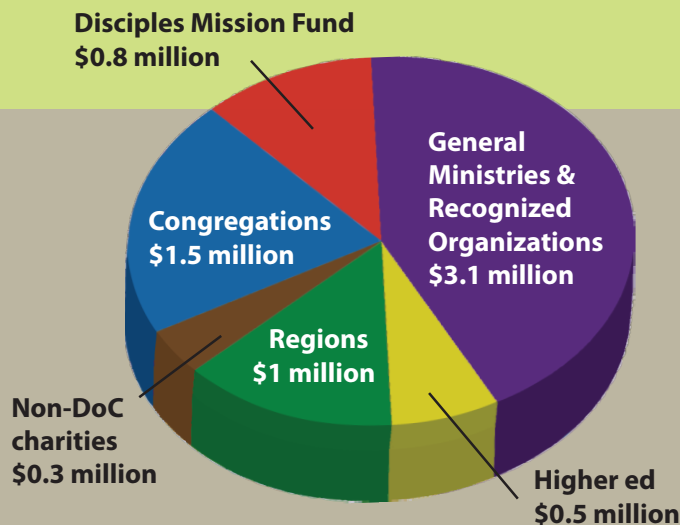
Our growth is focused on bearing fruit, which for us is generally measured both in our ability to distribute funds for ministry and to support our ministry partners in ways that increase their available funds for ministry.



**Assets held by the Christian Church Foundation (in millions)**

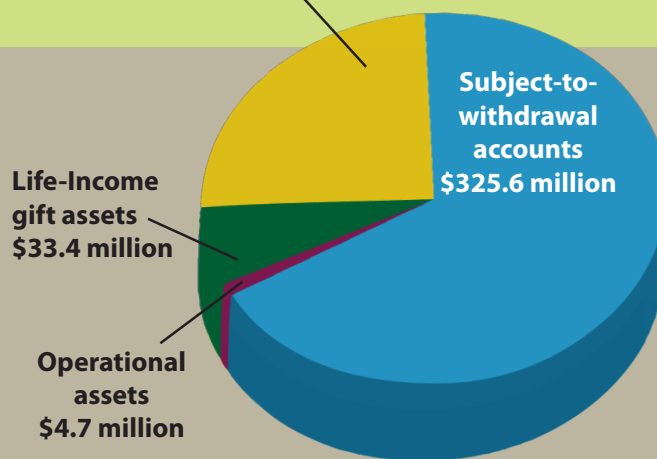






**2012 Total Distributions from Endowment, Donor-Advised Funds and Life-Income Gift Terminations**  
**> Total: \$7.2 million\***

**Permanent funds, Steward's Bank and other trust assets, \$138.0 million**



**Assets of the Christian Church Foundation as of Dec. 31, 2012**  
**> Total: \$501.7 million\***

*\*rounded to the nearest \$100,000*

Permanent funds and other gifts, held in trust at the Foundation, distributed \$7.2 million for ministry during 2012. These distributions, shown in the accompanying chart, supported ministries chosen by their donors. In many cases, funds for these gifts are provided at the end of the donor's life. These gifts honor us with an important task: To steward these legacy gifts in ways that share the witness of these faithful Disciples as a gift to future generations.

The second measure of our growth is our support for other ministries of the Christian Church (Disciples of Christ) through our gift planning and investment services. The goal of these services is to increase the funds that our partner ministries have to support their mission.

From the early days, the Foundation developed an investment strategy to provide good stewardship for long-term funds entrusted to the Foundation. Over time, it became evident that sharing our investment success with other ministries allowed those ministries to share in the economies of scale provided by combining investment dollars and investment oversight, and then allowed them to focus their energies on hands-on ministries.

As we closed 2012 with more than \$441 million in the Foundation's Joint Investment Trust, we are pleased to report that this also represents a new milestone in our shared ministry. The Foundation also supports ministries of our church by helping donors,

passionate about a particular ministry or ministries, to envision how they might use their resources to plant seeds that will support their chosen ministries for generations. Our staff listens to the needs of these donors and works to design gift strategies that will reflect the hopes and dreams of their donors—and provide consistent support to the ministries they cherish.

Tall oaks from little acorns grow. That was the theme of the Foundation's 1986 Annual Report and we've chosen it for this year as well. Some of the names on the pages that follow were listed in that 1986 report; most have been added since that anniversary year. I invite you to join me in celebrating the stewardship of all of these donors and the partnership of Disciples ministries. Together, we look ahead to the future, confident that God will continue to bless the planting of these seeds of faith, and to use these gifts to share the good news for generations to come. Thanks be to God!

Thank you for your partnership in the ministry of this church we all love. We stand ready to listen to your dreams and to help you plant and grow your legacy.

**Gary W. Kidwell**  
 President

## Board of Directors

Theodore Prentis Beasley  
Endowing Founder  
1900-1984



**James Sullivan, Board Chair**  
Danville, KY  
Founder & president  
Kentucky Trust Co.  
BS, University of Kentucky



**Rev. Thaddaeus Allen, Chair,  
Investment Committee**  
Parkersburg, WV  
Regional minister, Christian  
Church in WV  
BA, Bethany College;  
M.Div., United Theological Seminary



**Rev. Suzanne Webb, Board  
Secretary** St. Louis, MO  
Senior minister, Union Ave.  
Christian Church  
BS, Depaul University; MA and  
Ed.D, Western Michigan University



**Rev. Fred Harris, Chair,  
Nominating Committee**  
Hagerstown, MD  
BA, Bethany College; M.Div.,  
Vanderbilt University



**Grace Caress, Carmel, IN**  
Pension actuary for Wellpoint Inc.  
BS, University of the Philippines;  
MS, University of Illinois



**Susan Ward Diamond,**  
Montgomery, AL; Sr. Minister, First  
Christian Church, Montgomery  
BA, TCU; M.Div., Brite Divinity  
School; D.Min., United Theological  
Seminary



**Linda Hull, Jacksonville, FL**  
Chief development officer,  
Girl Scouts Gateway Council  
BA, Bethany College;  
MS, University of Pittsburgh



**Todd Reed, Walton, KY**  
Vice president of operations,  
RBF Services Inc.  
BS, University of Kentucky



**Linda Hernandez Williams,  
Board Vice Chair**  
Highland, CA  
Professional photographer/owner  
Halverson's Photography  
BS, California State University;  
MBA, University of Redlands, CPA



**Rodney Witte, Chair, Budget &  
Program Committee,** Denver, CO  
CEO, Tennyson Center for  
Children  
BS, Colorado State University;  
Bank Management, Pacific Coast  
Banking School



**Lynne Haley, Chair,  
Audit Committee**  
Houston, TX  
Accounting office manager,  
Pikes Peak of Texas Inc.  
BA, University of California



**Joan Bell-Haynes, Herndon, VA**  
Co-pastor, United Christian Parish  
of Reston, VA; BS, Albany State  
College; M.Div., University of  
Chicago Divinity School



**Debra Clayton, Topeka, KS**  
President, Clayton Financial  
Services/Certified Financial  
Planner;  
BA, Pittsburg State University



**Gloria Feliciano, Totowa, NH**  
Former staff to World Council of  
Churches and Central Pastoral  
Office of Hispanic Ministries  
AA, National College of Business



**John May, Wilmington, NC**  
Customer technical services  
representative, International Paper  
Co.; BS, North Carolina State  
University



**Rev. Samuel Robles Jr.,**  
Orlando, FL; Founding pastor of  
Arise Christian Church;  
BS, University of Central Florida;  
M.Div., Christian Theological  
Seminary



**Joel Santos**, Villa Hills, KY  
Academic coordinator, University of Cincinnati; Commissioned minister, Christian Church (Disciples of Christ); BA, Northern Christian College in the Philippines; ME, Phillips University; MA, Northern Kentucky University; Ed.S, George Peabody College



**Gregory Smith**, Lafayette, IN  
Owner, Smith & Co., Lawyers, PC. CPA and attorney; BS, Purdue University; JD, Indiana University



**Elizabeth Topliffe**, Grand Rapids, MI  
Head of Stepping Stones Montessori School; Certified Financial Planner; lawyer and former bank executive; BS and JD, Indiana University



**Josué Torres**, Bayamon, Puerto Rico; Assistant administrator of the Christian Church (Disciples of Christ) in Puerto Rico; BA and MBA, University of Puerto Rico



**Bob Williams**, Dallas, TX  
Investment consultant with Prudential; BBA, Stephen F. Austin University

## BEGINNING IN 2013



**Rev. Bob Bock**, Canyon Country, CA  
Senior pastor, First Christian Church, North Hollywood, CA  
BA, Depauw University; M.Div., Christian Theological Seminary



**Ted Waggoner**, Rochester, IN  
Attorney-partner, Peterson Waggoner and Perkins, LLP  
BS, Indiana State University; JD, Indiana University

## EX-OFFICIO MEMBERS



**Gary W. Kidwell**  
President  
Christian Church Foundation  
Indianapolis, IN



**Sharon Watkins**  
General Minister and President  
Christian Church (Disciples of Christ)  
Indianapolis, IN

## INVESTMENT, LEGAL & ACCOUNTING COUNSEL

### INVESTMENT CONSULTANT

Prime, Buchholz &  
Associates, Inc.  
Portsmouth, NH

### GENERAL LEGAL COUNSEL

Faegre Baker Daniels  
Indianapolis, IN

### INDEPENDENT ACCOUNTANT

BKD, LLP  
Indianapolis, IN

# Foundation Development Staff

CHRISTIAN CHURCH FOUNDATION



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**Rev. Dr. Bobby Hawley**  
**Vice President**  
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Certified Fund Raising Executive

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**Enrique Ocasio**  
**Vice President**  
**for Hispanics & Puerto Rico**  
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# Treasury & Administrative Staff



**Ruth Weaver**  
CPA, MBA  
Senior Vice  
President



**Lori Lucas**  
CPA  
Vice President  
& Controller



**Jim Cullumber**  
Vice President of  
Communications



**Sue Hansen**  
CPA  
Assistant Vice  
President of  
Gift Administration



**Cliff Chandler**  
CPA  
Assistant Vice  
President of  
Investment  
Program



**Joe Hartman**  
MBA Finance  
Assistant Vice  
President  
of Investment  
Program



**Cathie White**  
CPA  
Investment  
Services  
Supervisor



**Megan Gaza**  
Investment  
Services  
Staff  
Accountant



**Mary Lou  
Hayden**  
Investment  
Services  
Treasury  
Assistant



**Christy Stratton**  
Gift  
Administration  
Senior  
Accountant



**Bobbi Wesner**  
Gift  
Administration  
and Accounts  
Payable  
Accounting  
Assistant



**Karen Johnson**  
Executive  
Assistant  
Treasury  
Services



**Pat Kuhl**  
Executive  
Assistant  
Treasury  
Services



**Linda White**  
Administrative  
Assistant  
to the  
President



**Jessica Phillips**  
Administrative  
Assistant for  
Development



**Laura  
Brumbaugh**  
Administrative  
Assistant  
North Central  
Zone



**Midge Rach**  
Administrative  
Assistant  
South Central &  
Southwest  
Zones

# Standing STRONG

## Joint Investment Trust offers ministries strength in numbers

Despite two major economic recessions at the start of the 21st Century, the Foundation's investment program stands strong.

Seeds for the Christian Church Foundation investment program were first sown in the early 1980s when other Disciples ministries were seeking investment advice.

The Foundation started the Joint Investment Trust in 1991 to serve the ministries of the church with a quality long-term investment product that would allow them to share in the benefits of the Foundation's long-term investment experience. At the end of 2012, the Joint Investment Trust held more than \$441 million, including permanent funds held in trust at the Foundation and those funds owned by Disciples ministries.

Because of the Joint Investment Trust, Disciples ministries have access to the investment diversification, oversight and economies of scale otherwise available only to the very largest institutional investors.

Investors have benefited from the Foundation's expertise, which includes:

- Oversight by the Foundation's Investment Committee and independent investment consultant, who look at long-range trends and models for asset allocation strategies;
- Selection of best-of-class fund managers with experience and expertise in asset classes to implement the Foundation's investment strategy;
- Internal controls and independent custody of funds, designed to prevent fraud;
- Ongoing oversight of investment managers through on-site visits by staff and no less

### > Joint Investment Trust at a glance:

- More than 700 Disciples congregations, regions, general ministries and recognized Christian Church (Disciples of Christ) organizations have subject-to-withdrawal accounts in the Trust.
- At the end of 2012, the JIT had a total invested balance of \$441.3 million, which included new deposits of \$29.4 million during the year.
- Accounts can be opened with a \$1,000 minimum investment. While some ministries are just beginning to build their endowments, others have millions of dollars invested.

than quarterly analytical reviews through the investment consultant, Prime Buchholz & Associates. Foundation staff and the Investment Committee also independently review managers and the services of our consultant;

- Being a faith-based investor. The Foundation fulfills its fiduciary responsibility by ensuring that the resources managed reflect faith values. By sponsoring shareholder resolutions and engaging in dialogue with key corporate managers, the Foundation works to influence the way global companies conduct business, use resources and treat employees and the environment. The Foundation is a partner with the Interfaith Center on Corporate Responsibility. ICCR, a coalition of faith-based institutional investors, raises a prophetic voice of faith by integrating social values into corporate and investor decisions;
- Recordkeeping for restricted funds, including retention of bequest language and any history available on the original gift. When requested, the Foundation will put safeguards in place that ensure future governing bodies do not inadvertently violate restrictions on endowment gifts.

## Joint Investment Trust Funds & Historical Performance

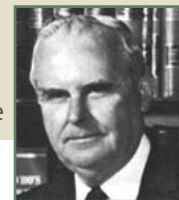
Fund description	1 yr.	3 yr.	5 yr.	10 yr.	Since Inception
<b>Beasley Growth Fund</b> seeks total return from a moderately aggressive asset allocation. The asset mix approximates 52% domestic equity, 20% international equity, 11% domestic fixed income, 11% global fixed income and 6% flexible capital.	<b>13.924%</b>	<b>7.756%</b>	<b>1.245%</b>	<b>6.747%</b>	<b>9.0% (Dec. 1985)</b>
<b>Common Balanced Fund</b> seeks total return from a moderate asset allocation. The asset mix approximates 44% domestic equity, 10% international equity, 15% domestic fixed income, 16% global fixed income and 15% inflation hedging.	<b>12.189%</b>	<b>7.872%</b>	<b>2.744%</b>	<b>6.461%</b>	<b>7.8% (Dec. 1985)</b>
<b>Campbell Multi-Strategy Fund</b> seeks equity-like returns with greater inflationary protection. The asset mix approximates 33% domestic equity, 20% international equity, 30% flexible capital and 17% real assets.	<b>12.467%</b>	<b>5.679%</b>	<b>NA</b>	<b>NA</b>	<b>0.5% (Feb. 2008)</b>
<b>Brown Income Fund</b> seeks income from a conservative asset allocation. The asset mix approximates 25% domestic equity, 29% domestic fixed income, 31% global fixed income and 15% real assets.	<b>9.547%</b>	<b>7.839%</b>	<b>4.849%</b>	<b>5.966%</b>	<b>6.5% (Dec. 1989)</b>

### STAFF CHANGES: New AVP of Investment Services has a familiar face

**Cliff Chandler**, assistant vice president of investment services since 2001, retired at the end of 2012. His successor, **Joe Hartman**, is a familiar face to Foundation investors. Joe, who began work at the Foundation in 2000, has been investment services supervisor, working alongside Cliff. **Cathie White**, CPA, joined the staff as investment services supervisor, and **Megan Gaza** joined the investment services staff as a staff accountant.



## HARRY T. ICE DISTINGUISHED SERVICE AWARD



Harry T. Ice

Huberto  
and Arlene  
PimentelVirginia  
and Frank Winker

# Nurturing growth

## Foundation recognizes philanthropy & service

The Harry T. Ice Distinguished Service Award is the highest honor the Foundation bestows to individuals that recognizes excellence in philanthropy and service to the Christian Church (Disciples of Christ). The award was presented to Rev. Huberto and Arlene Pimentel in 2012.

The Foundation's Board of Directors in fall 2012 named Virginia and the late Frank Winker as award recipients, presenting the honor in January 2013, making it just the 10th presentation since the award was created in 1984.

The award honors Harry T. Ice, founder of Ice, Miller, Donadio and Ryan law firm

in Indianapolis, who served on the original Blue Ribbon committee that led to the creation of the Foundation as a general unit of the Christian Church (Disciples of Christ) in 1969. He served on the first Board of Directors and was the Foundation's general counsel. He also held leadership positions within the Pension Fund, Christian Theological Seminary and other church entities. Mr. Ice died in 1982 at the age of 77.

The Pimentels openly encourage planned giving with Hispanic Disciples. They have put their own estate plans in place that include a gift to the church, and frequently share that with others. Huberto Pimentel likens it to the story of his grandfather, who at an elderly age planted mango seeds so that there would be mangoes for future generations to eat.

Their service to the church includes his work as national pastor of the Central Pastoral Office for Hispanic Ministries; Mrs. Pimentel has been an active leader in women's activities, including heading up arrangements for the 2014 Quadrennial.

The Winkers also have encouraged people to act on their generous impulses, steering many Disciples to the Christian Church Foundation. She is an attorney, and her husband owned a series of stores called "Frank's Big and Tall" before passing away in 2010.

In addition to their own gifts, Mrs. Winker influenced gifts from the Elizabeth L. and Russell F. Hallberg Foundation to several Disciples-related ministries.

They've served in key leadership positions in their home congregation, First Christian Church of Arlington, TX. Mrs. Winker also served on the Foundation's Board of Directors, including two years as board chair.

"She provided a quality of leadership that enabled the board to heal its conflicts, grasp difficult issues with clarity, and make the difficult decisions required to move the Foundation forward as the church changed its expectations and the financial worlds changed their products," said James P. Johnson, Foundation president emeritus who led the ministry while she was on the Board. "She was a constant source of support and encouragement to all of us on the staff and provided gentle, insightful, and wise leadership that enabled us to be better leaders than we would have been without her."

### Harry T. Ice Distinguished Service Award Recipients

James R. Reed **1984**

Joe and Nancy Vaughn Stalcup **1987**

Hannah Younghusband **1989**

Marvin G. Osborn **1991**

Sam and Mary Howard **1996**

Evelyn and Hal Watkins **2002**

Allan and Marie Brady **2004**

Bill and Benny Robertson **2009**

Huberto and Arlene Pimentel **2012**

Virginia and Frank Winker **2013**



## Named Endowment & Steward's Bank Funds

More than a thousand Disciples have discovered the joy of creating a personalized, donor-advised endowment through the Foundation for the benefit of their congregation, regional camp, or other beloved local or general church ministry.

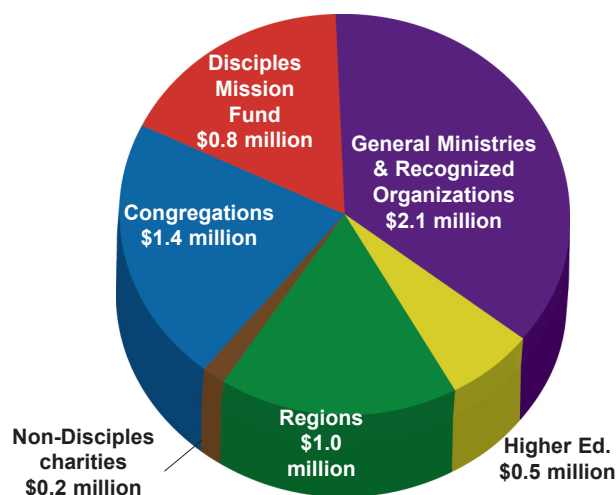
A named permanent fund is easy to establish and to adjust as the donor's charitable interests grow or change. Congregations, especially those prayerfully considering difficult questions surrounding closing or transitioning their ministries, may be delighted to discover that a legacy fund developed by the congregation to continue support of the ministries they love —can extend their witness for generations to come.

The stewardship of the funds listed on the following pages provides funding that supports and extends the ministries of the Christian Church (Disciples of Christ).

In 2012, \$8.2 million was added to named permanent funds, the largest amount this century. Donors established 86 new permanent funds, bringing the total under Foundation management to 1,300 funds. These funds ended 2012 with a total market value of \$130.7 million. Six congregations extended their witness by using remaining assets totaling a combined \$3.2 million to undergird ongoing ministries through permanent funds. A total of 73 Disciples legacy congregations have entrusted their assets to the Foundation to benefit the church's future witness.

We give thanks to God for these donors, whose names are listed following the fund to which they contributed. If there is an error or omission, please contact us.

The Steward's Bank represents another donor-advised option provided by the Foundation. This



**2012 Distributions from Endowment, Steward's Bank and other Donor-Directed Funds**  
**Total = \$5.8 million\***

*\* numbers rounded to nearest \$100,000*

donor-advised fund can be funded with a gift of \$10,000 or more —with the donor retaining the right to advise distributions from the full amount maintained in their named Steward's Bank account. Donors contributed more than \$655,000 into these donor-advised accounts in 2012. Funds administered by the Foundation are primarily for the benefit of the many and varied missions and ministries of the Christian Church (Disciples of Christ), however all giving options allow the donor to also benefit other charitable causes chosen by the donor.

At the end of 2012, the Foundation was responsible for \$135.1 million in endowment funds and Steward's Bank accounts.

The following pages list named permanent funds and Steward's Bank accounts, along with the names of donors to the respective funds.



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*Helping Disciples Make a Difference*

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