



Legacy



2011 Annual Summary



**"...build up
thy throne
to all
generations"**

(Psalms 89:4)

American Baptist Foundation

Our Mission

Since 1985, the mission of the American Baptist Foundation is to support and strengthen the Christian witness fulfilled by the Foundation's partners in ministry and mission. Our Partners include:



American Baptist Regions
(Multi-Region Corporation),



American Baptist Home Mission Societies, and



International Ministries

American Baptist International Ministries.

The Foundation encourages individuals to support the endeavors of these partners through what is known as “planned giving” — establishing wills and other charitable estate plans.



From the Executive Director

Greetings to all in Christ's name!

One thing is certain, there will always be change. Growth is change and there is beauty in growth. There is an appreciation for maturity and along with it an expectation for future blessings. This holds true for each of us and certainly provides a platform for celebrating our accomplishments and successes.

Here, at the American Baptist Foundation, we continue to be grounded by God's grace in our ministry of philanthropy. Our successes are best evidenced by the relationships established between ministry and support. Our rewards are revealed when lives and missions are transformed. Listening to a donor say "Thank you," while hearing the same sentiment expressed from a ministry partner is our reward.

This year, 2012, is already in full swing and a fresh blueprint for energizing our American Baptist partners has been welcomed with excitement. As we grow and are positively transformed, our core mission of *'connecting people who care to ministries that matter'* will not change.

By reviewing this issue of **Legacy**, we take this opportunity to express our gratitude to our donors, partners, and staff. Going forward, we continue our efforts to enhance ministry through creative stewardship by offering philanthropic resources, guidance, and education. You are each invited to grow and partner with us to identify your passions, desired legacy, and the **pathway** to live out this testimony.

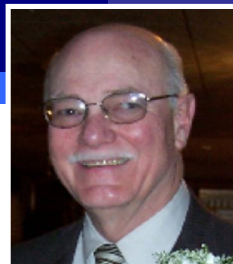
Blessings,

Rev. Perkin Simpson, MBA, CAP[®]

Executive Director

American Baptist Foundation

2011: The Year in Review



Dear Friends,

For the American Baptist Foundation, 2011 was a year of great success, driven by the following accomplishments:

- ✓ Formal Announcement of the Foundation's new Chairman of the Board, William Carlsen.
- ✓ Appointment of the Foundation's new President & Executive Director, Rev. Perkin Simpson.
- ✓ Successful launch of the Foundation's new website – www.abcofgiving.com.
- ✓ Successful development of a conceptual framework for a new model of planned giving.
 - *The new vision includes strengthening our full-service planned giving and investment operations while developing a process that would allow and encourage the development of creative stewardship throughout our American Baptist family.*
- ✓ Strengthening our investment capabilities.
 - *As a result of the Foundation's focus on endowment and investment services; in July 2011, a decision was made to hire the MER Group, a subsidiary of Merrill Lynch, as investment consultants to partner with our internal investment team—opening doors to untapped advice and a variety of research and investment tools.*
- ✓ Successful expansion of the *Gordon and Virginia Palmer Grant* program, resulting in the funding of greater than sixty (60) ministries, nationally and overseas.
 - *This grant ministry has proved and will continue to prove to be invaluable. We encourage all to keep a close watch for subsequent grant opportunities.*
- ✓ Successful development of a new "Ten Steps" program.
 - *Developed for our ministries and churches with the goal of establishing, communicating, and maintaining a customized planned giving model to supplement current stewardship.*

We believe that the actions taken have strengthened the American Baptist Foundation and improved its long-term growth prospects. However, there is always work to be done, and as a part of continuing our efforts to create value, we expect to continue to maintain our personal touch, offer great expertise, and take pride in delivering the best services possible.

We undertake these efforts with the goal of steady and dependable growth. We believe that our strong performance in 2011 and year-to-date is evidence of the continued confidence in the Foundation. You have grown with us and now we manage over \$98 million in assets (as of 1/31/12). Because of this, we want to assure you that we are just a phone call away and our doors remain open at all time.

Sincerely,
William A. Carlsen
Chairman of the Board

Investment Report

The mission of the American Baptist Foundation is revealed through our relationships with the donors we celebrate, as well as our partners in ministry who serve as the hands and feet of Christ. Our gift administration and endowment management services bear witness to how our organization provides financial support for all of our constituents. The following is a snapshot of how our ministry has impacted our partners during 2011* (*pre-audit*):

- ✓ Over \$1.2 million dollars in charitable distributions from matured planned gifts.
- ✓ Over \$800,000 in grant distributions from our Palmer Grant Program recognized in 2011.
- ✓ Over \$3 million in income payments to our donors from trusts and gift annuities.

Our faithfulness in providing endowment and related investment services has positively impacted our operations, increasing our assets under management to over \$93 million at the end of 2011 and over \$98 million as of January 31, 2012.

Endowment Funds

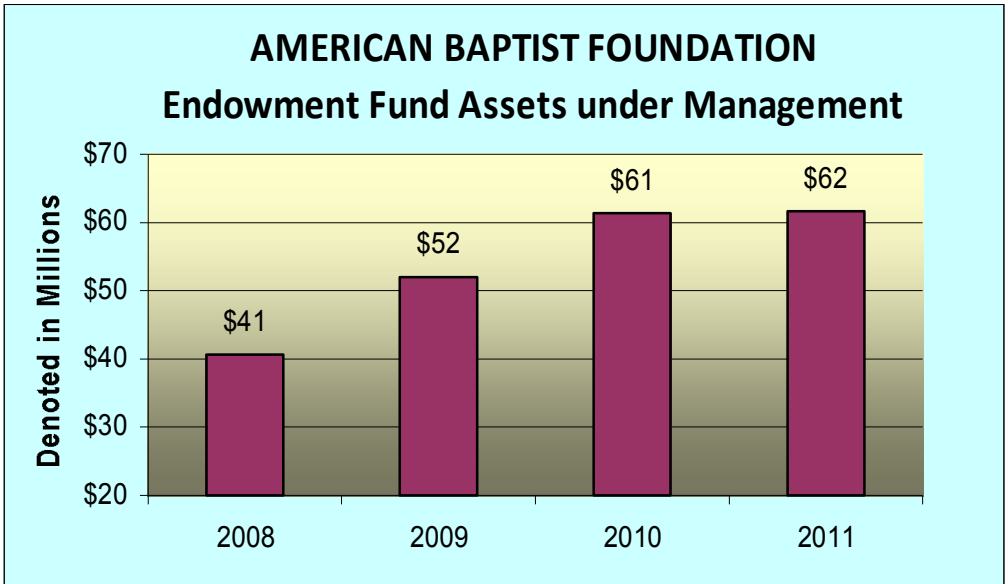
The largest financial component of our ministry centers on our Endowment Fund Services. As part of this platform, we administer both permanent and temporary endowments, as well as custodial investment accounts for the benefit of our American Baptist Churches and partners.

Endowment accounts grew from 270 at the start of the year to 295 as of December 31, 2011, with \$61.7 million in assets under management, for the period ended December 31, 2011. As highlighted in the chart on the next page, since 2008, growth in this area has been positive. We recognize our fiduciary responsibility to the donors and institutions we serve. All endowment and custodial investments exclude investing in alcohol, firearms and tobacco.

Our investment choices include three actively managed portfolio options: Stock, Blended, and the Bond portfolios.

- ✓ The Stock Fund is comprised of all stock (equities). This fund is the most aggressive and its objective is long-term growth.
- ✓ The Blended Fund is a balanced investment with a target of forty percent fixed income and sixty percent stock. Its objective is to achieve moderate growth while taking on moderate risk.
- ✓ The Bond Fund is comprised of all fixed income investments. Its main objective is principal preservation and has very low risk.

Investment Report



2011 presented a very volatile investment climate and as a result overall portfolio returns were below expectations. The results for the preceding five years are detailed on the chart below.

The year ended on a positive note with our Blended and Fixed portfolios outpacing their benchmarks during the fourth quarter while the Stock Portfolio was in line with expectations and aligned with the aforementioned Socially Responsible Investment (SRI) guidelines. These favorable results have extended into early 2012 and substantiate the recently established partnership between the Foundation and our investment consultants from the MER Group.

Portfolios:	2007	2008	2009	2010	2011
Blended	5.89%	-25.14%	16.32%	11.47%	0.70%
<i>Composite Benchmark*</i>	4.89%	-21.00%	16.44%	10.28%	3.14%
Stock	5.08%	-36.20%	22.13%	14.35%	-3.05%
<i>S&P 500 (price return)</i>	3.50%	-38.49%	23.45%	12.78%	0.00%
Fixed	7.97%	1.80%	8.11%	6.34%	4.93%
<i>Barclays US Aggregate</i>	6.97%	5.24%	5.93%	6.54%	7.84%

*The composite benchmark is comprised of 60% S & P 500 and 40% Barclays US Aggregate

Life Income Agreements

Charitable Gift Annuities (CGAs) and trusts are among the life income agreements that the Foundation administers. Both provide lifetime income and generous tax benefits to the donor while providing an opportunity to financially support their ministry of choice when the agreements mature.

Investment Report

Charitable Gift Annuities (CGAs) –

Because of their ease to establish and the security that they provide, Charitable Gift Annuities are one of the most popular types of planned gifts. Several annuitants passed away in 2011 reducing the number of annuities managed from 547 at the start of the year to 505 on December 31, 2011. However, the maturation of these agreements did result in over \$211,000 being distributed to support a variety of American Baptist ministries.

Once CGAs are received; they are pooled, segregated and invested separately from the Foundation's general operating funds. A current balance of over \$5.9 million ensures that a healthy reserve is sustained, and that the funds will be available for income payments during the life of the donor, while also being available for ministry at a later time. CGAs require complex administration and the Foundation continues to comply with all federal and state filing requirements.

Charitable Trusts –

Charitable Remainder Trusts (CRUTs), Charitable Remainder Annuity Trusts (CRATs), Revocables—and the like. The Foundation has the resources in place to administer—from the most simple—to the most complex—charitable trust agreements. On December 31 2011, the Foundation managed 116 trust agreements with over \$25 million in trust assets. Each trust is maintained separately and tailored to the specific needs of the donor, while honoring their desired legacy for ministry.

Summary

The Foundation is dedicated to maintaining an equilibrium of support, balancing the needs of our donors and the American Baptist ministries that they hold dear to their hearts. Our planned giving and investment vehicles and operations provide the path that makes creative financial stewardship possible. Recognizing our important fiduciary responsibility, we continue to devote our time, talents, and resources to the furtherance of Christ's work. The following pages illustrate some examples of what is being accomplished through our ministry partners in the US and throughout the world.



Compassionate orphan care

Making a World of Difference, Half a World Away

The Village-2-Village Project (**V2V**), a non-governmental organization, founded in Uganda by Laura J. Kroll in 2002, was *one of the sixty-four* Palmer Grant Program Award recipients during 2011. **V2V** provides holistic care for orphans and their caregivers whose lives have been impacted by civil war, and the attendant devastating spread of HIV/AIDS and other non-communicable diseases throughout Uganda. As a result of **V2V's** mission, sponsors and donors around the world are able to assist their program, in delivering hope to orphans and their caregivers by providing meals, clothing, shelter, tutoring, medical care, as well as spiritual edification.

Demand for this invaluable service has grown; however, **V2V's** ability to respond to these ever-increasing needs has been limited by budgetary and physical constraints.

As a 2011 Palmer Grant Award recipient, **V2V** will be able to garner the necessary critical technical and administrative support that is needed to ensure the effective interaction between their donors, sponsors, and service.

The resultant stability of having greater personnel resources will allow the **V2V** program an opportunity to support these burgeoning demands.



"Mama Laurie" (Laurie Kroll) with children in Serere, Uganda

Palmer Grant Spotlight

The Palmer Grant award has resulted in two new paid staff positions for **V2V**:

- **Sponsorship Coordinator** – providing sponsorship support, working with donors to ensure pledges and support are received and providing needed bookkeeping assistance.
- **Administrative and Information Technology Coordinator** – maintaining and improving communication and technology, including the development of email communications.

V2V, the brainchild of Laura Kroll and other members of the First Baptist Church of Bristol, has several committed sponsors and volunteers throughout the World which provide direct and auxiliary mission service. These new staff members will be a support to all of their endeavors. **V2V** is managed by an energetic and caring Ugandan staff that share their love for Christ, and serve as role models for the children, providing them with a solid biblical foundation as they learn and grow.

The **V2V** project is *only* one example of how the **legacy of Gordon and Virginia Palmer** will live on in perpetuity, enabling local, national, and international missions to dramatically impact and improve lives.

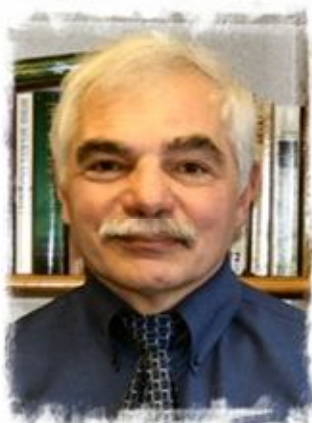
For upcoming grant opportunities please visit our website, www.abcofgiving.org for

additional information. "Add we pray to the children...who don't have any rooms to clean up, whose pictures aren't on anybody's dresser, whose monsters are real." (Ina J. Hughes)



American Baptist Churches of Massachusetts (TABCOM) *Partnership Training and Development, "A New Model for a New Time"*

Planned giving will always be relational, donor driven, and mission centered. We know that those individuals who are closest to the ministry and life of the donor can make the greatest impact for encouraging generosity.



Rev. Anthony Pappas
Executive Minister
TABCOM

Tony Pappas, the Executive Minister for The American Baptist Churches of Massachusetts (TABCOM) can attest to this. TABCOM, founded in 1802 by Pastor Samuel Stillman, was originally named the First Baptist Missionary Society of America. Today, TABCOM still maintains a strong missionary focus. They have partnered with the Foundation to strengthen their connection with their donors, using planned giving training as a portal for creative stewardship.

Along with other regions, TABCOM has selected local individuals who want to increase generosity in our ABC family *and fulfill their desire* to learn the fundamental language of planned giving.

Linda Cassel, the Foundation's recently appointed Director of Development has partnered closely with TABCOM and leveraged the resources of Crescendo's Gift College program, a leading provider of planned giving education, to make access to planned giving learning easy and cost-effective. Utilizing the capabilities of our website, www.abcofgiving.org, Gift College online courses, educational webinars, and personal training workshops are made available to TABCOM and other partners 24/7. Our website also hosts over 100 topics on planned giving, donor development, and Gift Law - a weekly e-newsletter available to anyone interested in issues that affect charities and proposed legislation coming out of Washington.

One key individual that has capitalized on the Crescendo Gift College program to learn the basics of planned giving is, Ed Guerard, former Director of World Mission Support, who has a central role in leading and developing the fundraising efforts for the friends of regional ministries.



Linda S. Cassel, CAP®
Director of Development
American Baptist Foundation

In addition to Ed, TABCOM also has several staff and volunteers taking Gift College courses, including an attorney who conducts planned giving workshops on their behalf. The result has been an increasing connection between TABCOM and their donors, and as a consequence support for ministry has also substantially increased. The Foundation applauds TABCOM's efforts!



Continuing support will further the work of TABCOM and other regions. Initiatives such as “Mission Explosion,” in which local churches join with their region, national denomination, and international partners to fulfill the great commission, will have greater reach. Human trafficking can be offset. Food, clothing, and shelter can be made available to those in need. Seminaries and other education facilities can be built. To borrow the hyperbole of John 21:25, “I suppose the world itself could not contain the books that could be written” about projects such as Mission Explosion. To God be the glory great things He has done! Even still, there is much more to do.

The Foundation values its partnership with TABCOM and other regions. These partnerships enable willing participants to be able to leave a legacy of faithful stewardship for generations to come. We encourage all who desire to support TABCOM or any of our other American Baptist partners to have a conversation with us -- to learn more about the opportunities available and create a strategic plan of action.

Neighborhood Action Programs: *Bringing Transformation and Hope*



The domestic mission arm of American Baptist Churches USA, American Baptist Home Mission Societies (ABHMS) answers the call to bring the presence of God's loving heart to the United States and Puerto Rico through a multitude of ministries that focus on discipleship, community, and justice.

Throughout our nation, individuals and families in disadvantaged neighborhoods face barriers that so often keep them from growing into the fullness of life that God intends for them. Through its support of **Neighborhood Action Program** Christian centers, American Baptist Home Mission Societies helps these centers reach out to disadvantaged neighborhoods with transformational services that include meeting basic needs for food, shelter, clothing and health care as well as providing job training and counseling.

ABHMS stands behind the 17 Christian centers across the United States and Puerto Rico as they extend the encouraging hand of friendship to their neighbors and develop ministries that meet the unique needs of their respective communities.



Discipleship ■ Community ■ Justice

Through these specially developed programs, **Neighborhood Action Program** Christian centers emulate Jesus Christ's teaching and healing ministry, touching people's lives in so many ways:

- ✓ In South Providence, R.I., a mother receives food for her children, along with counseling and prayer support, after her ex-husband ransacks her apartment.



- ✓ In Billings, Mont., families learn conflict transformation skills that help them to be loving and respectful with each other even through difficult times.
- ✓ In Hamtramck, Mich., a 48-year-old man overcomes a cocaine habit and finds a job.

- ✓ In Peoria, Ill. a Latina women's cooperative helps women practice English and math skills as well as earn extra money to help their families.

The partnership between **Neighborhood Action Program** Christian centers and ABHMS reflects the heart and soul of American Baptist Home Mission. Each plays an important role, one raising support and awareness and the other ministering directly among people in Jesus' name alongside local congregations and American Baptist regional ministries.

Community outreach through **Neighborhood Action Program** Christian centers is just one of many ministries made possible by American Baptist Home Mission Societies. Contact the American Baptist Foundation for more information about creative stewardship opportunities that support the continuing needs of these programs.



Dr. Aidsand F. Wright-Riggins III

Executive Director

American Baptist Home Mission Societies

American Baptist International Ministries



Tata et Mama Mbwanga showing off the first fruits of their family plantation in Kondji, across the river from Vanga Mission.

Palm oil is extracted from the pulp of the fruit. Its red color indicates that it's naturally rich in beta-carotene. Palm oil is used for cooking.

Oil Palms Bring Hope in Congo

In the 1950's, the Democratic Republic of Congo (DRC) was the world's leading producer of palm oil. As a consequence of the rampant and debilitating civil and ethnic strife over the past few decades, many of the palm oil plantations have now been abandoned. What remains are spindly old oil palms that line farmers' fields—remnants of an abandoned industry.

Jean Mupi knows this situation all too well. Subsistence farming provides the bare minimum for him and his family—enough to provide food and shelter. It won't pay for much more, including the opportunity for his kids to finish high school; pursuing higher education is a far fetched dream. Fortunately for Jean, the **Palm Oil project** is providing a glimmer of hope.

Many have not heard about oil palms and their potential. 100 oil palm seeds can give a motivated family a sustainable livelihood for a generation – enough to plant a dream. These oil palms produce huge bunches of thumb-size nuts that have oily fibers covering a shell that holds an oily nut.

These palms actually produce two kinds of oil:

- ✓ The oil from the outside of the nut is good for cooking or any other oil use such as making soap. You've heard of Palmolive™ soap.
- ✓ The oil from the inner nut is good for stiffening candy bars or making car wax.

The **Palm Oil project** is managed by the Baptist Agricultural Extension Program at ACIDI Lusekele, led by Director Timothée Kabila. The goal is to rebuild the oil palm industry in Congo along with the economic security of our Congolese brothers and sisters.

With the average income per family in the DRC at \$300 (USD) per year or 0.82 cents a day, this project will give 140 families the opportunity to establish a 1.25 acre plantation with the expectation of generating an extra \$300 (USD) per year for each household, giving families better access to healthcare, improved education, and other life-changing opportunities.

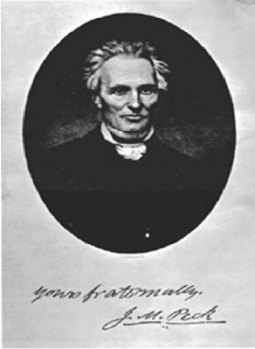
Jean was among the first to receive palm seeds, secured by a small subsidized loan. His farm is now producing enough oil to accumulate a small surplus for sale. As he repays his loans, it will give another family the same chance to dream. Steady income from palm oil production has made a difference for Jean and others in the DRC.

Consider supporting this ministry by establishing a planned gift that will provide economic security for families like Jean's. The American Baptist Foundation is here to lend a hand.



*Rev. Dr. Reid Trulson
Executive Director
International Ministries*

John Mason Peck Society



The John Mason Peck Society was established in 1996 as a way to acknowledge all those—past and present—who have remembered American Baptist ministry and mission in their charitable estate plans. Membership now numbers more than 680. However, many more people could become members of the Society since they have named their church or an American Baptist organization in their wills or through other planned gifts. If that includes you, please contact the Foundation office by phone at **1-800-222-3872, ext. 2035**, or visit us online at <http://www.abcofgiving.org/contact-us>. Your membership may inspire others to consider making plans to do what you have been doing for years—supporting American Baptist outreach!

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