



ALAMO HEIGHTS
UNITED METHODIST CHURCH

Impact Report



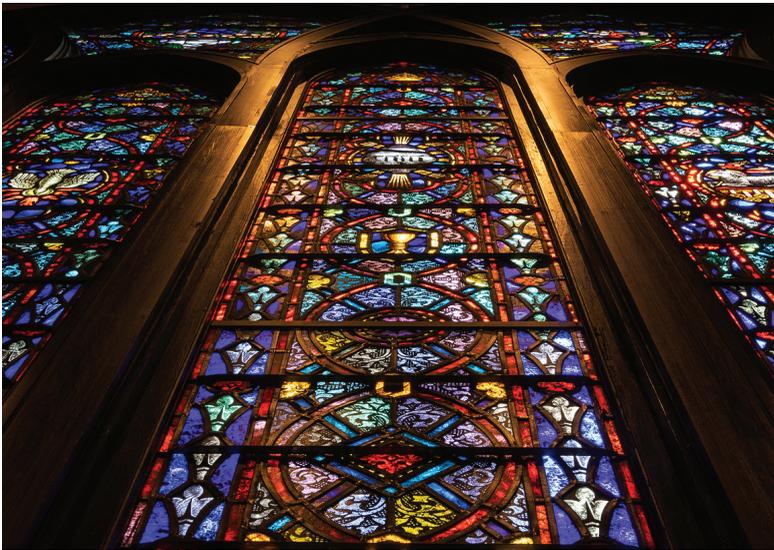
AHUMC FOUNDATION

*Ordinary People Supporting
Extraordinary Potential*



OUR PURPOSE

The AHUMC Foundation exists to benefit the church in its efforts to welcome all people, build community, share God's love, and serve the world.



Through gifts from trusts and bequests that minimize tax burdens, the AHUMC Foundation has been able to reinforce and reinvigorate the church for almost 50 years.

OUR VISION

The story of God flows through a legacy of love. It always has. Ordinary people contribute to this legacy with expressions of remembrance, gratitude, and hope. The AHUMC Foundation provides donors a vehicle to participate in preserving the church and allowing it to continue to flourish.

OUR CORE VALUES

SERVANT LEADERSHIP

In each and every relationship, our first question is: How can we help you? Servant leadership is central to who we are as an organization and a ministry.

INTEGRITY

The AHUMC Foundation will always seek to do what is right for those whom we serve and for the purpose to which we have been called.

EXCELLENCE

The AHUMC Foundation strives to navigate every relationship, investment, and project with the high expectations we set for ministry. It is our goal to be effective, efficient, service-oriented, and ministry-minded.





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A LETTER OF WELCOME

MY BROTHERS AND SISTERS,

"I thank my God every time I remember you. In all my prayers for all of you, I always pray with joy because of your partnership in the gospel from the first day until now, being confident of this, that he who began a good work in you will carry it on to completion until the day of Christ Jesus." Philipians 1:3-6

For almost 50 years, your partnership and investment in the AHUMC Foundation has supported ministries across San Antonio and South Texas in achieving their God-inspired potential and purpose. Your support has allowed the AHUMC Foundation to serve as a trusted partner that utilizes your investments and endowments to grow and encourage the church. The result of that support is not abstract. In the past year, AHUMC:

- Welcomed 78 new members—baptizing 26.
- Offered 21 free adult discipleship courses to over 600 registered participants.
- Hosted 6 different 12-Step Recovery programs welcoming over 150 people in 11 weekly meetings.
- Helped to facilitate 7 different support groups that welcome and care for hundreds of people each month.
- Served 177 individuals through *The Hope Center*.
- Distributed 189 blessing bags, 4,286 cans of food, and 775 Heart Pillows.
- Enrolled 40 students reflecting ethnic and economic diversity in *Arts for All*.
- Paid our apportionments to the conference in full.

As we look ahead, we recognize the continuing need for the Foundation to walk alongside clergy and lay leaders in discerning purpose and providing encouragement to build a thriving congregation with world-engaging ministries. Our ongoing efforts must steward giving legacies that empower the local church and its ministries and initiatives long into the future. Perhaps our most important calling, however, is to ignite the imagination of church leaders, emboldening them to ask new questions and seek new ways to strengthen the church's vital role in the world.

Your partnership with the AHUMC Foundation makes all that possible. Together we have accomplished so much and we will continue to invest in the life-changing power of love as we preserve, celebrate, and pass on our rooted faith.

In Christ,



REV. JASON ADAMS

Senior Pastor

Alamo Heights United Methodist Church

OUR LEADERSHIP

Our directors and board members are elected by the church and have the responsibility to carry out your wishes according to the Articles of Incorporation of the Foundation.

Directors

Rev. Jason Adams

Senior Pastor

Rev. Jason Adams is an elder in the Rio Texas Conference and the Senior Pastor of AHUMC. Since his ordination in 1997, he has served in churches in San Angelo, San Benito, Corpus Christi, New Braunfels, and San Antonio.



Lindsay Hannah

Finance Director

Lindsay is excited to be part of AHUMC's ministry work. She earned her Bachelor's and Master's in Accounting from The University of Texas at Austin. Before joining the church staff, she spent many years working in the tax department of a locally based corporation.

Renee Kizziar

Board Chair

Renee is a CPA who graduated from the accounting program at Miami University in Ohio, and has an MBA from the University of North Carolina at Chapel Hill. She joined AHUMC in 1979 after moving to Texas to marry Jim. Most of her 25 year professional career was in accounting and regulatory compliance with Pricewaterhouse Coopers.



Valerie Slade

Executive Director

Valerie has a BBA in Finance from Texas Tech University. Prior to her ministry at the church, Valerie spent many years working in the banking industry as a Commercial Credit Operations Manager and Human Resources Manager.



**For a current list of AHUMC
Foundation Board members, please visit
ahumc.org/foundation**

OUR STORY

Almost 50 years ago, the Alamo Heights United Methodist Church Foundation began its journey toward empowering the church.

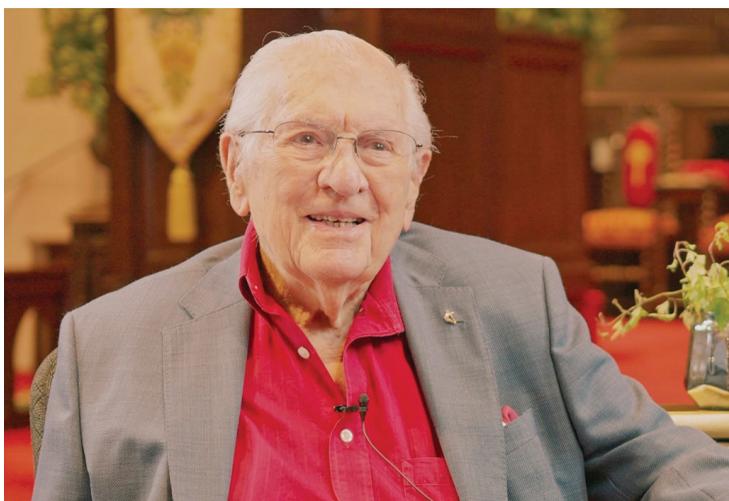
In the wake of the energy crisis, members of Alamo Heights United Methodist Church determined to ensure the ability of the church to continue to thrive and answer the call to social and spiritual leadership.

On February 24, 1977, the Foundation began with a single donation of \$500.

Since that time, the Foundation has continued to fulfill its purpose of helping the church in its efforts to welcome all people, build community, share God's love, and serve the world.

In the 1990's, the Foundation helped the church in its move from Broadway to the newly constructed Basse Road Campus—a move that planted seeds and empowered future growth.

From 2006 to 2020, Rev. Dr. Harold Burkhardt worked tirelessly to grow the Foundation and provide for the future of the church. "Burky" helped to lead the Foundation through a season of phenomenal growth, including the largest gift the Foundation has ever received—a contribution of over two million dollars.



The Foundation was a crucial support during the season of uncertainty unleashed by the COVID-19 pandemic. The stability and presence of the Foundation not only allowed the church and Weekday School to retain staff and teachers but to respond to the changing needs of serving the community and sharing the gospel.

Beginning with our charter in 1977, our most life-giving times have consistently been the result of stepping forward boldly in faith and connection to others. We were founded to be an instrument of divine love and grace, and that calling persists. It informs every decision we make.



“The story of God flows through a legacy of love. It always has. Ordinary people contribute to this legacy with expressions of remembrance, gratitude, and hope.”

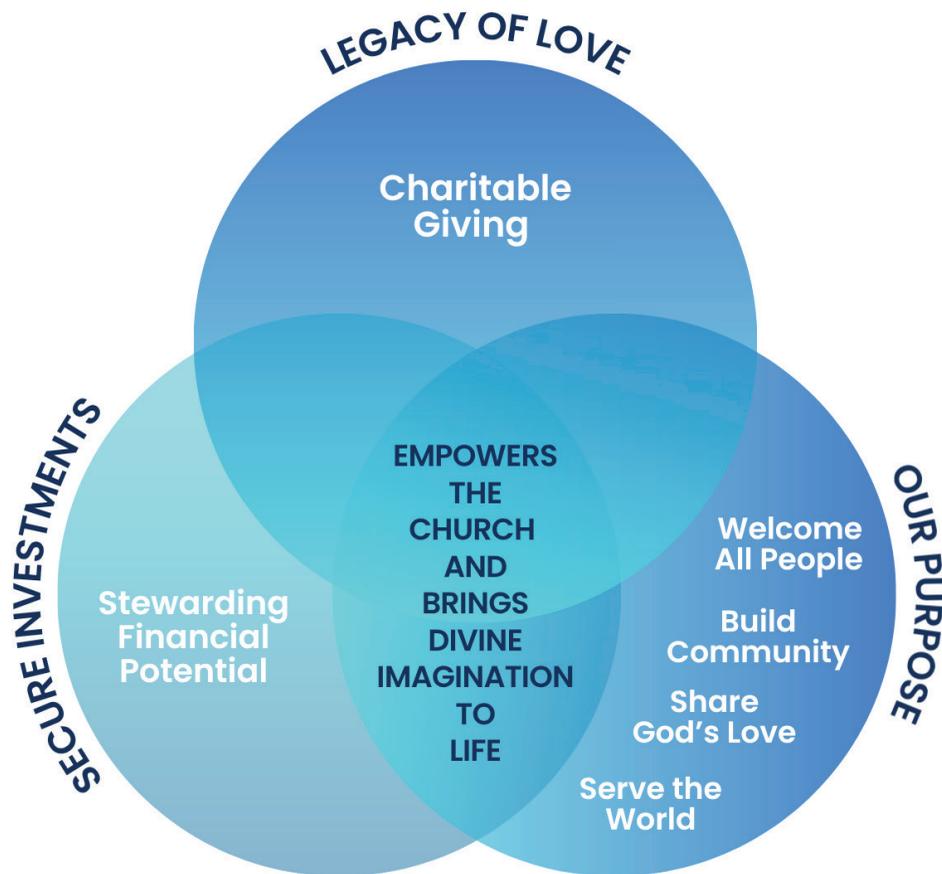
Simply put, the Foundation is ordinary people supporting extraordinary potential. Your bequests empower the church and bring divine imagination to life.

We remember our forbearers who believed in the mission and role of the church.

We are grateful for our grounding in the story, community, and love of God.

And we hope—not only for today—but for the generations that will follow after.

OUR MODEL



LEGACY OF LOVE

The story of God flows through a legacy of love. It always has. Ordinary people contribute to this legacy with expressions of remembrance, gratitude, and hope. The AHUMC Foundation provides donors a vehicle to participate in preserving the church and allowing it to continue to flourish.

OUR PURPOSE

The AHUMC Foundation exists to steward the potential of the church in its efforts to welcome all people, build community, share God's love, and serve the world. Our philanthropic and legacy donors provide ongoing and future support for the ministries and initiatives of the church as it boldly serves and loves others.

SECURE INVESTMENTS

The AHUMC Foundation's primary goal is to provide a permanent endowment for AHUMC and extend the reach of its ministries. Unless otherwise specified by the donor or the distribution formula, only fund earnings can be spent. The principal remains secure, and distributions are used to strengthen and expand the ministries of the church.

“The Foundation gives people in the church the ability to make a gift that keeps on giving.”

*Bruce Cauley,
former AHUMC
Foundation Director*

“The AHUMC Foundation provides for more than just our financial future. It provides leadership, offers encouragement, and sparks the imagination of our church to share the love of Christ with the world.”

*Rev. Jason Adams,
Senior Pastor*



Volunteers help build children's bunk beds for Sleep in Heavenly Peace.

New Zion Youth Choir visits a nursing home in Nashville



“Because of what people have given, the Foundation is able to step in and say ‘Let us help.’”

*Bill Balthrope,
former AHUMC
Foundation Chair*

“The sustaining presence and partnership of the Foundation allows us to both dream dreams and take steps forward in faith and service that we would not feel empowered to undertake otherwise.”

*Valerie Slade,
Executive Director*

THE AHUMC FOUNDATION...

Welcomes All People—over 2,000 each year—by funding community events like the Harvest Festival, Festival de Navidad, and the Easter Egg Hunt.

Shares God's Love through its annual support of the Children's Ministry, Youth Ministry, Music Ministry, and Adult Learning.

Builds Community by helping the church host safe and consistent education, support, and activities for all ages.

Serves the World by supporting initiatives such as Mission Central, The Hope Center, and Project Transformation.

Partners with the church in the pursuit and support of programs that provide spiritual education for children and families in our community.

Receives gifts of all types and sizes—including real estate, stocks, bonds, and other securities.

Prevented staff layoffs and ministry shutdowns during the hardest months of the COVID-19 pandemic shutdown.

Has provided over \$3 million in support of church ministries.

Supports the development of AHUMC's centrally located campus to serve both the local community and the larger city.

Can be designated as a beneficiary of a portion of your estate or insurance policy.

Manages trusts, bequests, and endowments that have sustained and invigorated the church since 1977.

Plays an integral role in supporting the annual budget of the church.



Welcomes All People

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Builds Community

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Serves the World

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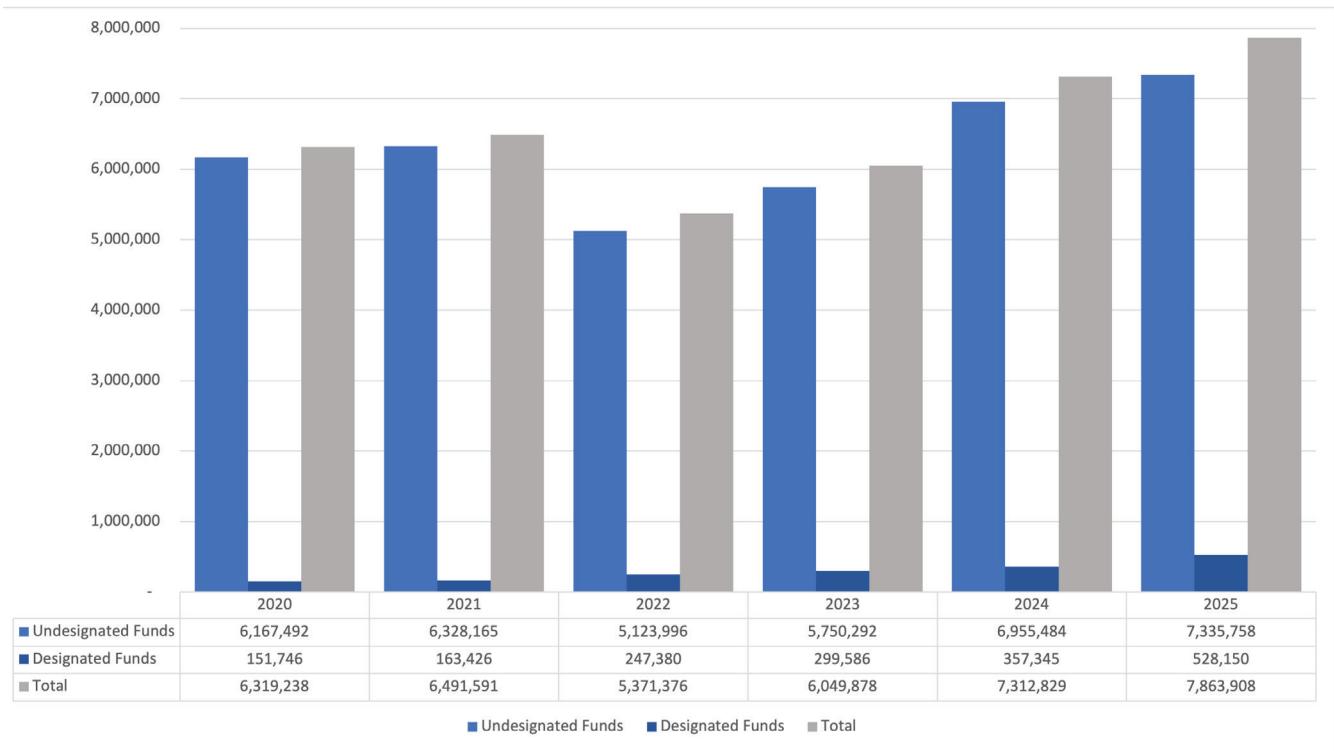


Shares God's Love

Shares God's Love through its annual support of the Children's Ministry, Youth Ministry, Music Ministry, and Adult Learning.

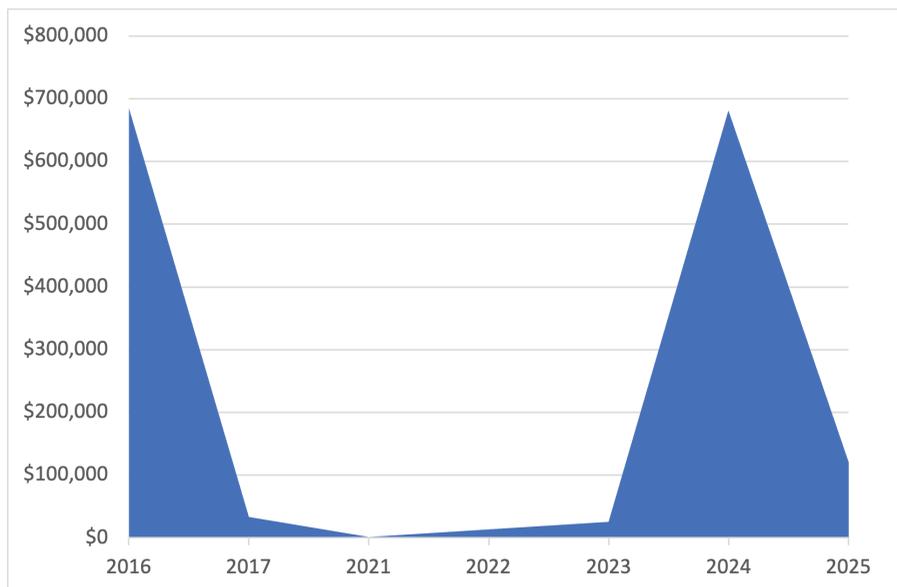
OUR FINANCIALS

Foundation Value



Gifts to the Foundation

Year	Total Gifts
2016	\$684,933
2017	\$33,718
2021	\$1,200
2022	\$13,638
2023	\$25,600
2024	\$681,500
2025	\$120,513
Grand Total	\$1,561,102



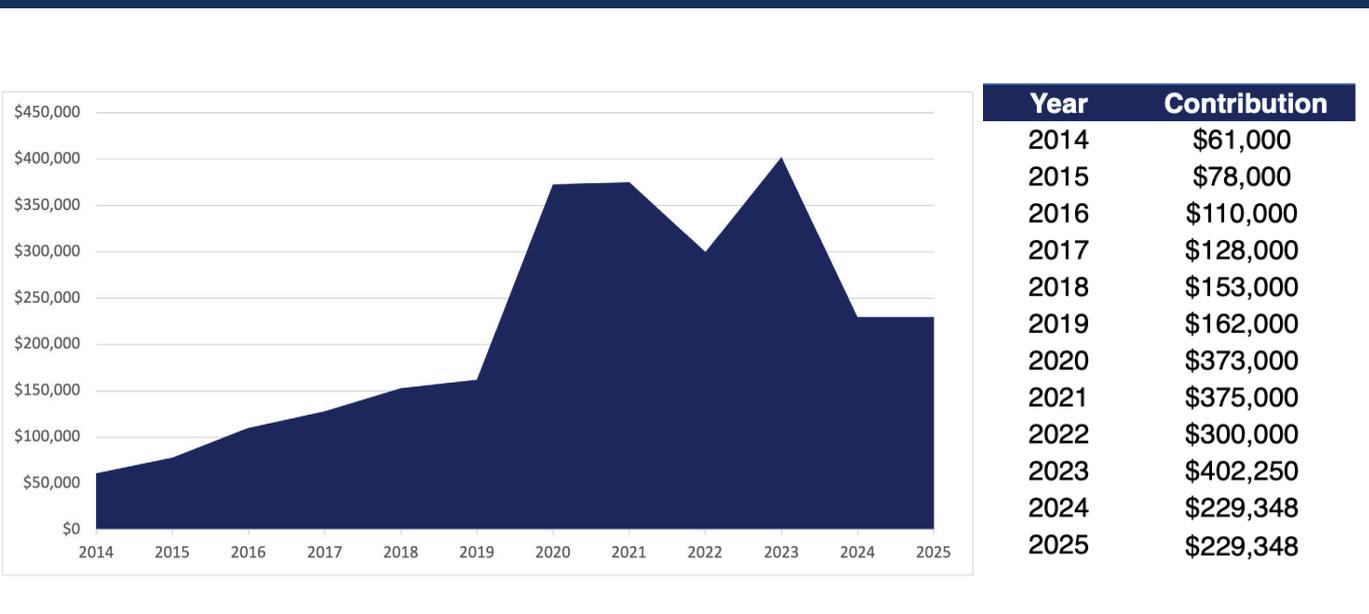
A Sound Investment Partnership

Since 2012, the AHUMC Foundation has consolidated a majority of its funds with the Texas Methodist Foundation. Texas Methodist Foundation serves as a trusted partner for investing church assets through institutional investment funds for endowments and foundations; Impact Notes for churches, nonprofits, and individuals; and expert financial counsel on financing church growth and new ministries. For over 85 years, the Texas Methodist Foundation has supported churches and ministries across Texas and New Mexico to achieve their God-inspired potential through cultures of purpose, generosity, and courage.



Operating Budget Support

As a result of continued growth in the endowment, the Foundation began supporting the ministries of AHUMC by making annual contributions to the operating budget. From 2004 to 2019, the Foundation contributed nearly \$1 million in support of the ministries of AHUMC. From 2020 to 2023, in response to the realities of the COVID-19 pandemic, the Foundation more than doubled its contribution to the budget. Through this very generous support of nearly \$1.5M, the church was able to maintain its staff, open the building when it was safe to do so, and continue ministry in new and creative ways.



WAYS TO GIVE

Planning the legacy of your gift begins with conversation and reflection as we work closely with you and your advisor to determine the best charitable giving vehicles to create a legacy that extends well into the future.

How to Give	Advantages of Giving	Gift Type
Bequeath your personal estate in your will	Exempt from federal estate taxes in some cases	Bequest
Name AHUMC as the beneficiary of all or a portion of your retirement assets	Minimize tax burden to heirs	Retirement Plan Gift
Make a tax-free gift from your IRA	Satisfy Required Minimum Distribution (RMD) without increasing income taxes	Qualified Charitable Distribution (QCD)
Enter into a contract that makes fixed payments annually, quarterly, or monthly	Current and future savings on income taxes; fixed payments for life	Charitable Gift Annuity (CGA)
Make a gift of stock	Escape the capital gains tax on the appreciation, receive a charitable deduction on income taxes	Stock, bonds, securities
Create a trust that pays a fixed or variable income to AHUMC for a set term and then passes to heirs	Reduces size of taxable estate; keeps property in family, often reducing gift taxes	Charitable Lead Trust

CONTACT OUR TEAM

If you would like to learn more about additional giving options to ensure your gift makes the greatest impact, please contact us to discuss your philanthropy goals.

Phone

210-826-3215

Website

ahumc.org/foundation

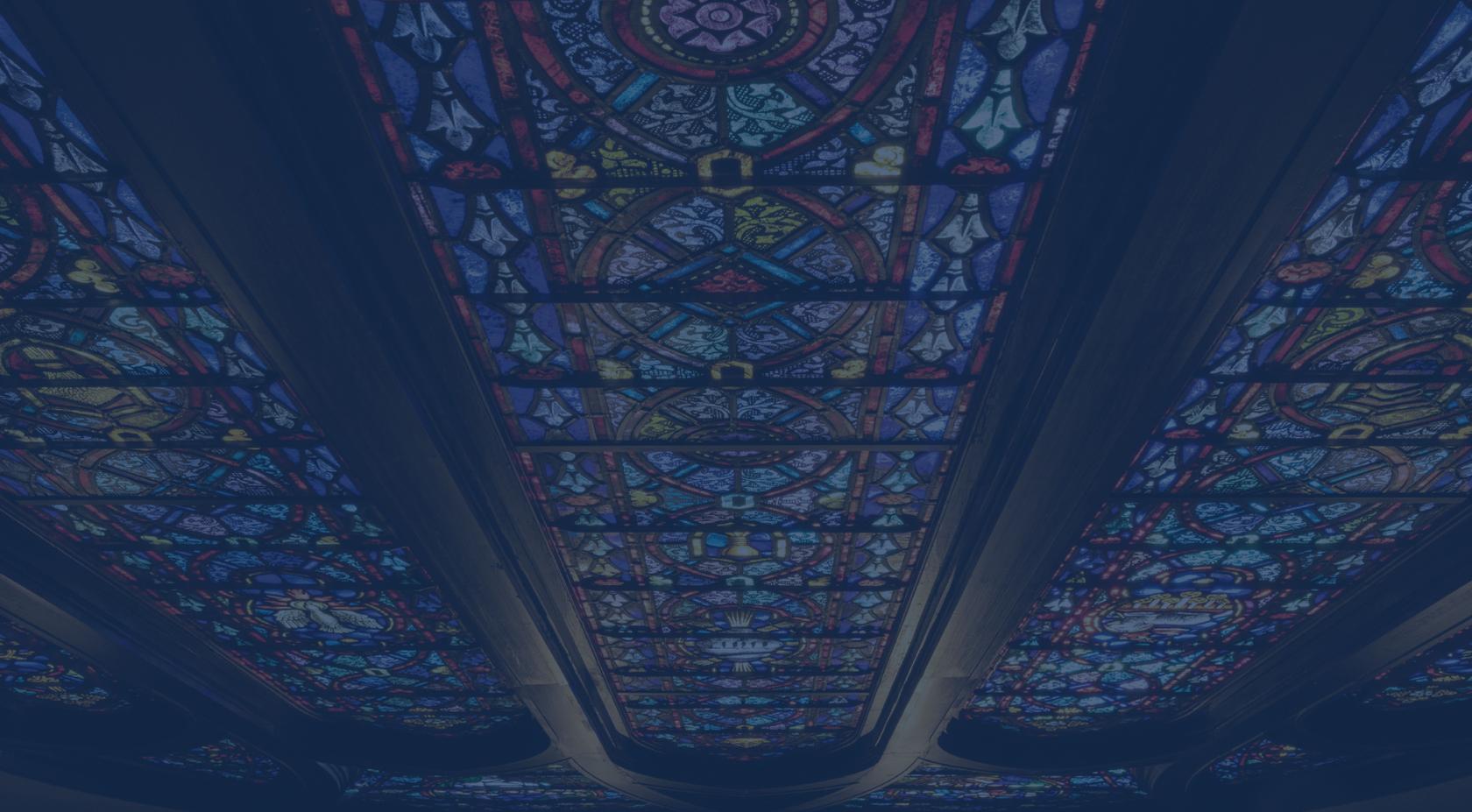
Tax ID

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AHUMC Foundation
825 East Basse Road
San Antonio, Texas 78209

Your bequests empower the church and support its potential to bring divine imagination to life.





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For more information

VISIT [AHUMC.ORG/FOUNDATION](https://www.ahumc.org/foundation)