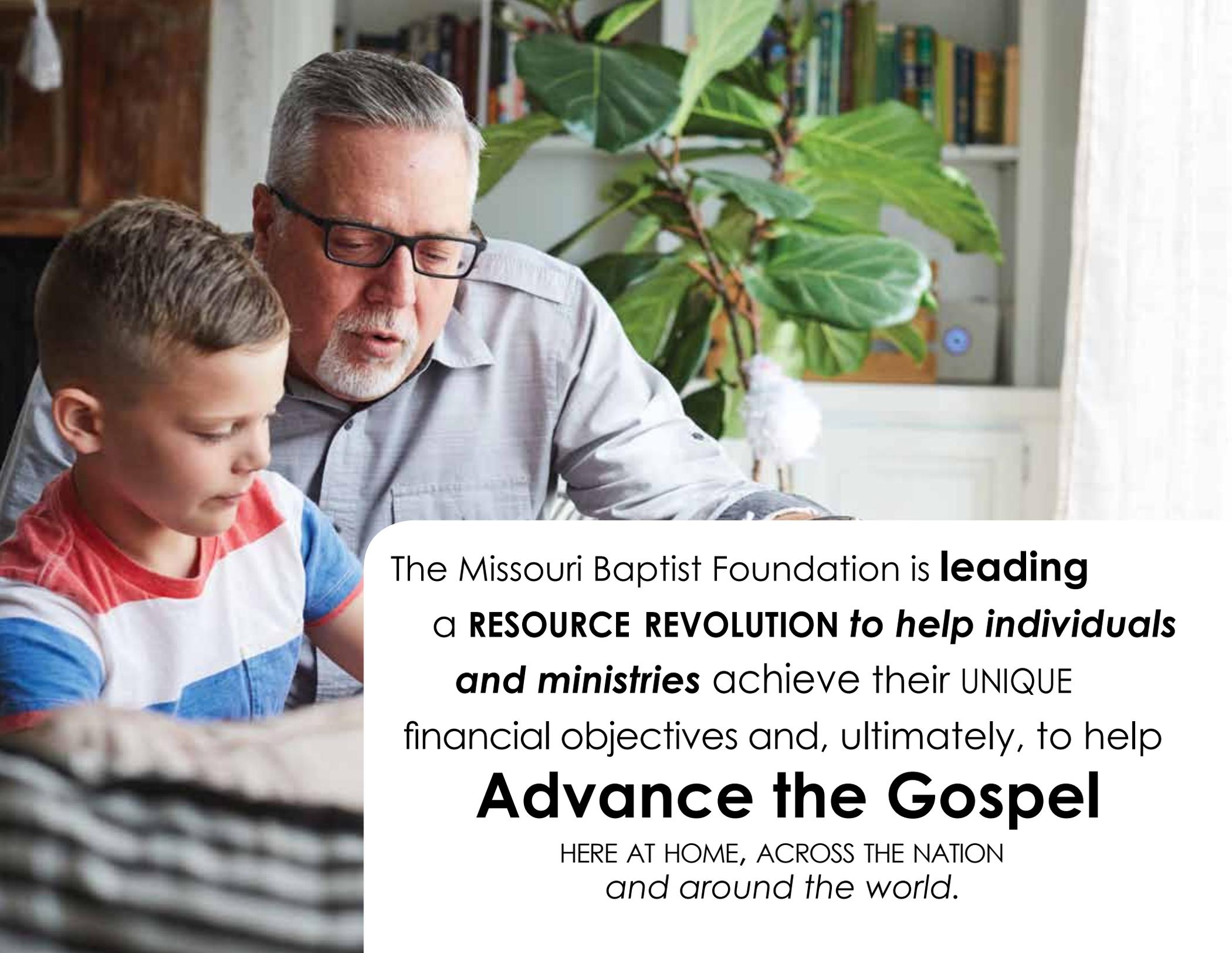




# Advance the Gospel



The Missouri Baptist Foundation is **leading**  
a **RESOURCE REVOLUTION** *to help individuals*  
*and ministries* achieve their UNIQUE  
financial objectives and, ultimately, to help  
**Advance the Gospel**

HERE AT HOME, ACROSS THE NATION  
*and around the world.*

# Today, tomorrow and 10,000 tomorrows!



*Dear Friends,*

*Since 1946, the Missouri Baptist Foundation has developed, managed and distributed funds for the benefit of ministries around the world. Currently the MBF has more than \$144 million in assets under management in 900 accounts. Our professional staff and MBC-elected trustees are committed to encouraging a revolution of resources that benefit ministry today, tomorrow and 10,000 tomorrows to ensure we Advance the Gospel together.*

*The Missouri Baptist Foundation wants to guide you through the many opportunities you have to make decisions about your resources. Whether you are a ministry, church or association looking for an interest-bearing cash account, saving for a building project, or both, we have tools and resources to help. Maybe you are an individual with some questions about estate planning, but thinking you don't have much. Or, maybe you have been financially blessed and don't know who to trust. MBF can guide you to the right tools for your situation and help you be a good steward of what God has entrusted to you.*

*We look forward to hearing from you about what your goals and dreams are for your legacy that will Advance the Gospel.*

*Blessings,*



*Dr. Neil Franks, CEP  
President and Treasurer*

**“Do the work** of a preacher *of the* **Good News,** and  
**perform your WHOLE DUTY** *as a* **SERVANT of GOD.”**  
— 2 Timothy 4:5b

# Money Management for **Ministry**

## Financial Strategy Design

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**Helping ministries develop plans for funding God-given ministry dreams.**

What is the health of your church budget? Are you working with a budget deficit/surplus, or no budget at all? We are equipped to assist your church or organization, no matter the status of your financial health.

## Asset Growth

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**Cash management, term deposit, and long-term endowment**

**management.** Depending on the goals of your ministry, the resources available and your intended purposes, our experienced and educated employees can help you best decide how to invest your assets for both preservation and growth.

## Church Loans

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**New construction, remodels, and cash flow needs.** The competitive rates of the MBF will provide your church the money needed to best provide for your changing needs.



# Possibility Planning for People



## Estate & Gift Planning

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**Guidance for wills, trusts, powers of attorney, current and planned gifts.** MBF can help you in any and all stages of your financial journey. We want to guide you as you determine how to Get Well, Live Well and Finish Well financially.



## Trustee Services

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**Providing fiduciary oversight on the fulfillment of client wishes and instructions.** We can serve as personal representative alleviating the burden on your family and can serve as a successor trustee for your trust, providing peace of mind through the process of aging.



## Generosity Education

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**Generosity Education Discipleship based tools encouraging a lifetime of stewardship and faithfulness.** We can assist through seminars, sermons, workshops and personal financial coaching.



# Financial Strategy Design

The MBF can be your ministry or organization's financial partner. Our staff is equipped to meet and assist you in any stage of creating a financial plan.

## Every ministry needs:

- Money today to pay the bills. . .
- Money easily available for emergencies. . .
- Development and management of money to be used over the long-term.

It all starts with a plan from a properly crafted budget to an ongoing maintenance plan. Let us help you think through the next five, ten or twenty years. What do you know you need now? What are the costs? How will you pay for it?

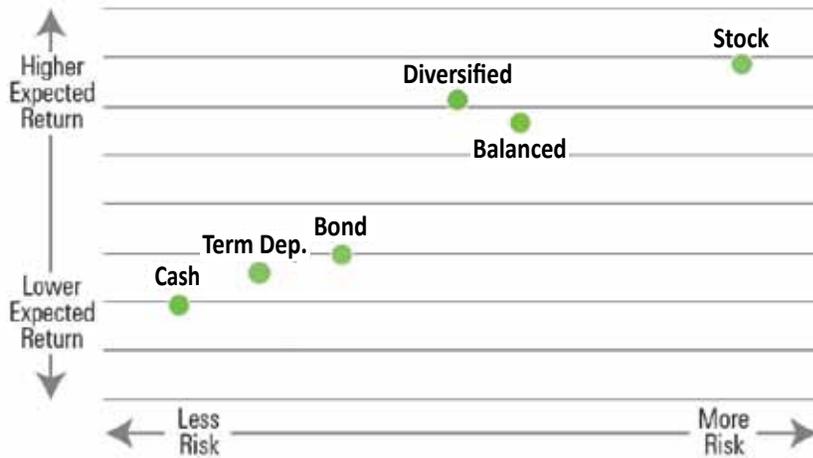
We can assist while you engage current donors and educate long-term ones to continue giving long after they are gone.



# Asset Growth



## Expected Risks & Returns



## Investment Options for Organizations:

- **Short-Term** – FDIC insured accounts with access to funds within 48 hours of request.
- **Intermediate-Term** – Deposits with variable rates, supports our church loan program.
- **Long-Term** – Balanced and Diversified Fund options provide a higher expected return while distributing approximately 4% annual dividend. Balancing market volatility by providing a stock/bond blend with an additional option into alternative investments.
- **Optional Investments** – An aggressive all-stock option and a preservation-minded bond fund. Customized asset allocation available.

**Stewardship** begins the moment a gift is received. Managing entrusted resources is not a task to be taken lightly. MBF partners with Commonfund and its Strategic Solutions Group in their Outsourced Chief Investment Officer (OCIO) model for management and fiduciary stewardship of assets entrusted to MBF. By outsourcing this complex and ever-evolving responsibility, MBF can focus on what it does best; support our constituents in everything financial. In turn, by partnering with MBF, our constituents can focus on what they do best, Advance the Gospel.



# Church Loans



In partnership with *WatersEdge Ministry Services*, MBF is pleased to offer loans to Southern Baptist churches, associations, organizations and entities. Whether you are ready to build a new space, renovate existing facilities or have a ministry need that requires financial support, MBF is here to assist you. We offer highly competitive financing with compelling benefits. Unlike traditional lenders, the interest from your MBF/*WatersEdge* loan is poured back into Kingdom causes.

# Estate & Gift Planning



There is a time for  
***EVERYTHING,***  
and a season  
**FOR EVERY ACTIVITY**  
*under the heavens.*

—Ecclesiastes 3:1

MBF has a passion for every Christian to GET WELL, LIVE WELL and FINISH WELL as it relates to the resources God has entrusted to you, while you take care of your family. (1 Timothy 5:8) Our professionals are ready to walk with you as you go through the process to prepare the necessary documents that will pass on your legacy to your family, friends, and ministry.

- Personalized and Professional Assistance
- Gift Proposals and Illustrations
- Life Income Plans
  - Charitable Gift Annuities
  - Charitable Remainder Trusts
  - Donor Advised Funds
  - Give it Twice



# Trust Management Services

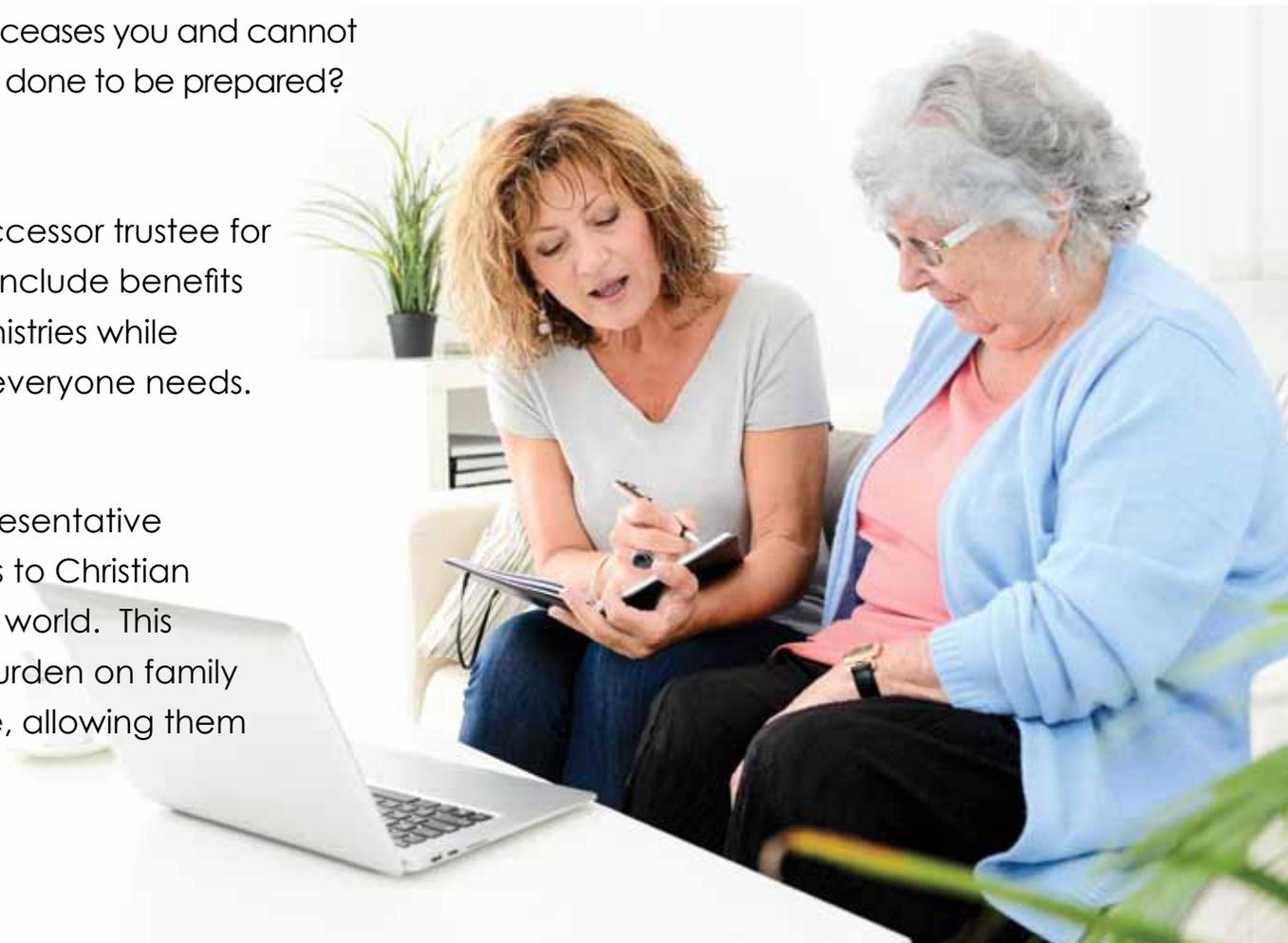
Approximately 47 million seniors live in the United States today, age 65 and older. The average American life expectancy is 78 years old. Although the number of seniors in America is forecasted to double by year 2030, estimations cannot predict the number of those incapacitated before death. If only we knew what was coming at us, we could be best prepared. What if your trusted friend or family member predeceases you and cannot carry out your wishes. What have you done to be prepared?

## **Trustee or Successor Trustee**

MBF is able to serve as trustee or successor trustee for all types of trust arrangements that include benefits for churches and other Christian ministries while providing the protection and care everyone needs.

## **Personal Representative**

MBF also can serve as personal representative in estates which include distributions to Christian ministries in Missouri and around the world. This professional service alleviates the burden on family while closing their loved ones estate, allowing them to concentrate on their family.



# Generosity Education



MBF provides resource training to help followers of Christ live out their life fully.

## Individuals

Personal, Confidential Financial Pastoring, Estate Reviews and Vision Casting for your Financial Future.

## Groups

These resources include:

- One-hour seminars
- Great for Sunday School, Small Groups for all ages of adults
- All at no cost to the church

Seminars

- The Four H's of Financial Wisdom: Heart, Health, Habits and Hope (Developed by Ron Blue Institute)
- Six Questions Every Christian Must Answer Before They Die and the Documents They Need Before They Do!

Speaking on Biblical Stewardship and more is also available. Such as; Conferences, Sermons, Public Speaking, Senior Adult Events, Church Staff Retreats and more . . .





# MISSOURI BAPTIST FOUNDATION

PO Box 1113  
Jefferson City, MO 65102-1113



400 East High Street  
Suite 500  
Jefferson City, MO 65101



@Missouri Baptist Foundation



Mo Bapt.Foundation@mbfn



MBFN.org



mbfoundation@mbfn.org



573.761.0717



800-776-0747



The mission of the Missouri Baptist Foundation is to strengthen the mission and ministry efforts of Missouri Baptists, in our state and around the world.