

Pine Forest UMC Memorials, Honorariums and Wills Policy

Funds Defined:

Memorial funds are donations given to Pine Forest Church to honor deceased individuals. Honorarium funds are donations designated to honor living individuals. Wills are funds bequeathed to Pine Forest.

Though the guidelines in this document pertain to both memorials and honorariums, only memorials will be specified. The only difference is that honorees, themselves, will be consulted as to how their honorariums will be used, not family members.

Intent: In keeping with the desires and expectations of the donors, every effort is made to ensure that gifts are used to benefit Pine Forest in its mission to serve God and the community while honoring those in whose names the gifts are given.

Committee on Gifts and Wills: Three members (including the Chairperson) will be nominated by the Nominations Committee and elected by Charge Conference.

Procedure:

1. Gifts and Wills Committee will select one member to send acknowledgments to memorial donors.
2. Gifts and Wills Chairperson will contact families to learn their wishes as to how memorials will be spent.
3. Gifts and Wills Committee, in consultation with the pastor, will maintain and, when requested, provide a list of needs and suggestions to families.
4. The Chairperson will obtain signed statements from family representatives specifying their preferences as to how memorial funds are used.
5. When memorials are designated for church property, approval must be obtained from trustees. Property is defined as: church facilities, grounds and contents; Boy Scout hut, grounds and contents; cemetery; parsonage, grounds and contents. Trustees will appoint or give approval to those who will carry out expenditures.
6. Gifts to pastors, pastors' families or other paid staff will meet the approval of Gifts and Wills Committee and Chairperson of Staff Parish Relations Committee.
7. When memorials are given to missions, the Council on Ministries will be informed. Memorials will go directly to the specified missions unless they are outside those customarily supported by the church. In that event, approval must be forthcoming by the Council on Ministries before proceeding. When necessary, the Council on Ministries will appoint persons who will see that the church complies with families' wishes.
9. When project approvals are not forthcoming, the families will be asked for alternatives.
10. The Chairperson will include in a monthly report to the Church Council: (1) balances of designated and undesignated funds; (2) approved gifts to pastors, pastors' families and staff and (3) completed projects funded by memorials.
11. Approvals given by Trustees and Council on Ministries will be reported to the Council by the chairpersons of those committees.
12. When amounts of more than \$100 remain after families' wishes are executed, the families will be given opportunity to designate other expenditures, unless they prefer to merge the remaining monies with other memorials. See below.
13. When memorial projects are finished, remaining memorial funds in amounts less than \$100 will be merged with other such monies to fund projects determined by Gifts and Wills Committee.
14. Families will be advised that memorial funds left undesignated beyond six months will be classified as unappropriated memorial funds that may be used to fund items determined by Gifts and Wills Committee. The Gifts and Wills Committee may determine exceptions to this guideline.
15. The Chairperson will inform appropriate families when memorial projects are complete.

Wills: Chairperson of Gifts and Wills will be joined by the Council Chairperson and Pastor when evaluating and complying with wills in which Pine Forest is beneficiary.

