



November 2006  
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888.525.6530 (toll-free) or 405.525.6530

www.okdisciplesfoundation.org

## GROWING PAINS

## and Shifting Gears

### Please visit with us at:

Oklahoma Disciples  
Foundation Board Meet-  
ings—November 14 at  
Phillips Theological  
Seminary  
February 13 at Okla-  
homa Disciples Center

Northeast Area Board  
Meeting—November 20

First Christian Church,  
Oklahoma City—  
November 26

Growth means change. Inevitably pain is part of the process. Shifting gears means change. Inevitably pain is part of the process (if it is a "stick" shift and you have ground the gears). Change is inevitable and so is pain, the degree depending on how it is done. The Oklahoma Disciples Foundation Board has been growing and shifting this year, making changes (not too painful) to enhance our service and provide greater accountability to you, the donor. By working together, with an understanding of how ODF functions, we can more faithfully fulfill our common calling to provide for the future proclamation of the Gospel of Jesus Christ.

Earlier this year we adopted a new investment policy and a new spending policy. As we developed the former, we recognized the need to look carefully at who and what was available in investment managers. Investment strategies today re-

quire diligent measuring "sticks", as in benchmarks and peer group performance, which tell us how we are doing in comparison to others. It is not about being in competition with others, rather it is the effort of the Board of ODF to be more faithful to their fiduciary responsi-

bility. While such comparisons may be painful, they often contribute to a greater degree of health.

To test the waters of investment managers we sent out fourteen Requests For Proposal to

manage the investments, and, to our surprise, we received eleven in return. The Board's Investment Committee narrowed the eleven down to four who were interviewed – all in one day – (a little pain endured). After additional research the committee recommended and the Board unanimously approved to move our investments to JP Morgan. The change over began on November 1.

We are grateful to the Trust Company of Oklahoma for a strong, long term relationship of faithfulness and trust that has served ODF well for over forty-six years (a painful goodbye). We look forward to building on this solid foundation to continue the ministry of financially under girding the future proclamation of the Gospel.

We welcome the opportunity to provide even more information, because we want you to know all you care to know about this "best kept secret" of the Disciples of Christ in Oklahoma. Contact us toll free, 888-525-6530 or email, [kvmaxwell@okdisciplesfoundation.org](mailto:kvmaxwell@okdisciplesfoundation.org).

Camps & Conferences • Church Growth • Pastoral Care • Senior Adult Care • Leadership Development  
Disciples Educational Scholarships & Institutions • Oklahoma Disciples Women's & Men's Fellowship  
Christian Church (Disciples of Christ) in Oklahoma

### My Enduring Gift

I/we wish to make a perpetual gift to the Oklahoma Disciples Foundation, Inc.

Please select the endowment fund(s):

- ☐ Camps & Programs  
☐ Senior Adult Care  
☐ Pastoral Care  
☐ ODWF ☐ ODMF  
☐ Disc. Scholarships & Institutions  
☐ Regional Ministries

☐ Other \_\_\_\_\_  
(Full list at [www.okdisciplesfoundation.org](http://www.okdisciplesfoundation.org))

Disciples Club  
Annual Gift \$ \_\_\_\_\_

#### Tax-Deductible Gift Enclosed:

Check \$ \_\_\_\_\_ Cash \$ \_\_\_\_\_ Pledge \$ \_\_\_\_\_ # \_\_\_\_\_ installments @ \$ \_\_\_\_\_  
(Gifts are recorded in the calendar year.)  
Credit Card \$ \_\_\_\_\_ MasterCard ☐ VISA ☐ Discover ☐  
Name on Credit Card \_\_\_\_\_  
Credit Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_  
Signature \_\_\_\_\_

#### Donor Information:

Name(s) \_\_\_\_\_  
Please list my/our donor name(s) as: \_\_\_\_\_  
Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Phone \_\_\_\_\_ Email \_\_\_\_\_  
I/we attend \_\_\_\_\_ church in \_\_\_\_\_

Questions? Call 888-525-6530 (toll-free)

Return to:  
Oklahoma Disciples Foundation  
301 NW 36th  
Oklahoma City, OK 73118

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## In This Issue

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- Foundation FAQ's
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## Foundation FAQ's A Guide to IRA Charitable Rollover

The Pension Protection Act of 2006 was signed in August, allowing IRA owners age 70 1/2 and older to "rollover" directly to Oklahoma Disciples Foundation (or any charity) up to \$100,000 in 2006 and 2007. The transferred amount is excluded from the IRA owner's taxable income and can count toward the minimum required distribution in each year. To qualify, the transfer must be made directly from the IRA to the foundation and must be for an outright gift (not a trust or other planned gift). There is not an income tax deduction for this contribution; the amount is simply not included as income.

Other requirements are: the contribution must be to a public charity, but not to a donor-advised fund at a charity; the transfer cannot go to a private foundation or supporting organization; and it must come from a traditional IRA.

An IRA Charitable Rollover can be used to establish a new fund in Oklahoma Disciples Foundation, or add to an existing fund. For more details email lghill@okdisciplesfoundation.org or call 405.525.6530.

## A Challenge Put Forth!

Recently at the Regional Assembly men's luncheon, Tim Kowalski, treasurer for Oklahoma Disciples Men reported on the men's endowment fund in Oklahoma Disciples Foundation. He noted that thus far in 2006 more than \$1600 dollars had been contributed to the fund by Oklahoma men.

Not bad, I thought. But then it occurred to me, we men can and will do better if we have a challenge before us. So I publicly suggested that we needed to strive towards accomplishing \$20,000 in the fund by years end. (Tim had reported that the fund currently stood at \$16,307.05. so \$20,000 seemed reasonable.) It occurs to me that we all respond better when there is a goal to be achieved and when we know what that

goal represents.

For Disciples men, this permanent endowment fund, first established in 1991 has been a growing phenomena. In just the past 3 years, more than \$5,844 has been contributed. Why? Well, I think there are two reasons: first, men understand and appreciate the concept that their gifts are permanent - that their gifts will out live them - and that the earnings from these gifts will benefit men's ministry for generations to come; second, men know first hand exactly how these gifts are being used. Each January when they gather in retreat, excellent speakers are provided and costs kept reasonable because of the subsidy that has been available as a result of the endowment fund.

### Oklahoma Disciple Men's Endowment Fund

the Oklahoma region, Disciples men may have yet another opportunity to see the earnings from the endowment fund assist in scholar shipping Oklahoma men under 30 to Sessions 2008. There just is no limit to what these earnings can accomplish when the endowment fund continues to grow as a result of the men of the church making generous contributions.

So, the challenge was put forth - \$20,000 by year's end. That day at the luncheon, the immediate response was \$550 towards the \$3693 needed to reach the goal. Disciple men, join me in fulfilling the challenge. Send your gift today!

From your faithful challenger,



Rev. Thomas R. Jewell,  
Regional Pastor



With Sessions 2008 – the every four year gathering of Disciples men from across the United States and Canada – to be held here in