

Metro District Treasurer Training

Kim Shafer, PO Box 480638, Charlotte, NC 28269 704-599-9206

email address: KimShaferMetroUMW@outlook.com

Below are many of the guidelines for Unit Treasurer:

- Checks should always be made out to Metro District Treasurer – not to me. Please add your Unit/Church city/town on all remittance and SMR forms. This will allow for correct accounting as often there is more than one unit with the same church name.
- Collect pledge cards from your members – encourage everyone to participate.
- Encourage everyone to participate in the Legacy Fund. It is only \$18.69 for 5 years to improve the endowment. The Legacy Fund is a permanent endowment with generated income that will enable United Methodist Women to distribute grants and scholarships, coordinate work with mission personnel and make needed upgrades to technological and communication systems and more. The Legacy Fund will ensure a regular source of support for these core expenses of being in mission. It will enable United Methodist Women to enhance programming and launch new initiatives to address emerging needs of women, children and youth.
- Based on those pledge cards and prior years actuals, prepare your Unit's pledge for the Metro District – include name, email, mailing address and phone number.
- Forms for both the Remittance and Special Mission Recognition Pin (SMR) can be found at www.wnccumw.org. Click on the Mission Giving tab (at the top) and then click on 'Treasurer Forms'. You should only be using 'Local Unit' Treasurer forms.
- Quarterly pledge remittances to Metro District are encouraged, but not mandatory.

Quarterly remittances are due to Kim Shafer, PO Box 480638, Charlotte, NC 28269 to be mailed by (or before) the following dates:

- Tues, February 23rd
- Tues, May 25th
- Tues, August 24th
- Tues, November 23rd
- Note these date are a month prior to accounting quarter end dates.
- Remittances can be mailed any time throughout the month/year, the above dates are just suggestions, but remittances received after December 2nd may be posted to the following year.
- The quarterly remittance form must be included with all checks. The quarterly remittance form is generic, so you don't have to worry about if you have the correct form – it is the same form if you mail a remittance quarterly or once a year.
- SMR (**Special Recognition Pins**) can be given by your Unit anytime throughout the year, but need to be ordered 6-8 weeks prior to your need for them. You don't need to wait until submitting a quarterly remittance form, just remember to complete the SMR form with your check and mail both to Kim Shafer.
- Encourage your unit to use Gift to Mission cards and Gift in Memory cards throughout the year. You will include those amounts in the Remittance form. Best time to pick up cards is at Metro District and Conference events.
- Encourage your unit to do a 'Walk for Mission' – it's healthy for your unit, is great fellowship and a good time to think about and pray about all those you are helping.

- Remember to be specific about which NATIONAL Line 7 organization you are supporting with Designated giving and include that information on the Remittance form.
- You are responsible for submitting your annual budget to your local unit board – a draft form is included with these documents.
- Gift in Memory cards are a good way of honoring someone's memory at any time. A Gift in Memory can also be done for other than UMW members, and is not limited to those who died. It is such a special way to remember someone. Many units give a Gift in Memory when any church member dies. Remember there is no charge up front for Gift in Memory cards, but a minimum of \$5 donation along with the information from the tear-off tag to your local Unit Treasurer. Those funds would be collected by the Local unit treasurer and included as one amount in the Quarterly remittances.
- To be a Mission Today Unit, you must first make and meet your Pledge. Find the most current Mission Today unit criteria on www.wnccumw.org
- To meet giving in all Five Channels of Undesignated Giving, a minimum of \$5 is required for Special Mission Recognition, Gift to Mission, Gift in Memory and World Thank Offering. Walk to Mission is not required, but is a great encouragement to keep active and support Women, Youth and Children!
- Sign up to receive the Metro District and Western NC Conference emails that contain important information. Go to www.wnccumw.org and click on the 'About Us' tab and then scroll down and select 'Join our email list' and complete the form.
- I encourage you all to read *response* magazine – you will benefit spiritually and also be inspired.
- Let me know if you have any questions throughout the year.

Most Pleasant United Methodist Women

Sample Budget

Yearly Budget

Pledge to Mission	1,935.00
Special Mission Recognitions	150.00
Gift to Mission Cards	50.00
Gifts in Memory	50.00
World Thank Offering	78.00
Call to Prayer & Self Denial	65.00
Legacy Fund	186.90
Local Missions	300.00
Conference General Scholarship Fund	50.00
Conference Love Offering	90.00
District Love Offering	90.00
Conference Annual Meeting - Delegate (President)	100.00
Conference Annual Meeting - First Timer	100.00
Spiritual Enrichment Retreat - First Timer	75.00
School of Christian Mission - Mission Education and Interpretation Coordinator	75.00
School of Christian Mission - First Timer	75.00
UMW Sunday/New member welcome	63.10
Reading Program Books	125.00
Flowers, fruit baskets, etc.	50.00
Hands-On Mission Project (postage)	100.00
Program Resources	125.00
Miscellaneous (stamps, etc)	50.00
Total	<u>3,983.00</u>

(Suggested items that may be on a Local Unit Budget)

Give this pledge card to your unit treasurer.

PLEDGE TO MISSION CARD FOR

Name: _____

Address: _____

Date of pledge: _____

For the coming year, I pledge \$_____ to be paid:

(check one) monthly quarterly yearly

MEMBERSHIP/PLEDGE CARD

(member retains)

United Methodist Women

This certifies that

(Member's signature)

is a MEMBER of UNITED METHODIST WOMEN

of _____ Church

President _____ Date _____

PLEDGE TO MISSION CARD

As a member of United Methodist Women, I celebrate and commit to supporting United Methodist Women's local, national and global mission outreach.

For the coming year, I pledge \$ _____



Building a Community



We are faith, hope and love in action.

FAITH

Thousands of women participate in our reading programs and educational opportunities annually to grow spiritually, become more deeply rooted in Christ and put faith into action.

HOPE

Our national mission institutions empower women, care for children, educate and equip youth, care for the neglected, advocate for social justice issues, create economic opportunities and strengthen neighborhoods.

LOVE

Our members give out of their love for the world and provide financial support for national mission institutions, higher education scholarships for international students, and 121 programs taking place in 110 countries.

ACTION

United Methodist Women members' voices are heard around the world as they call for justice on issues such as immigration, human trafficking, domestic violence, health care and the environment.



Contact us for further information:

United Methodist Women
475 Riverside Drive, Room 1501
New York, NY 10115
212-870-3725

www.unitedmethodistwomen.org

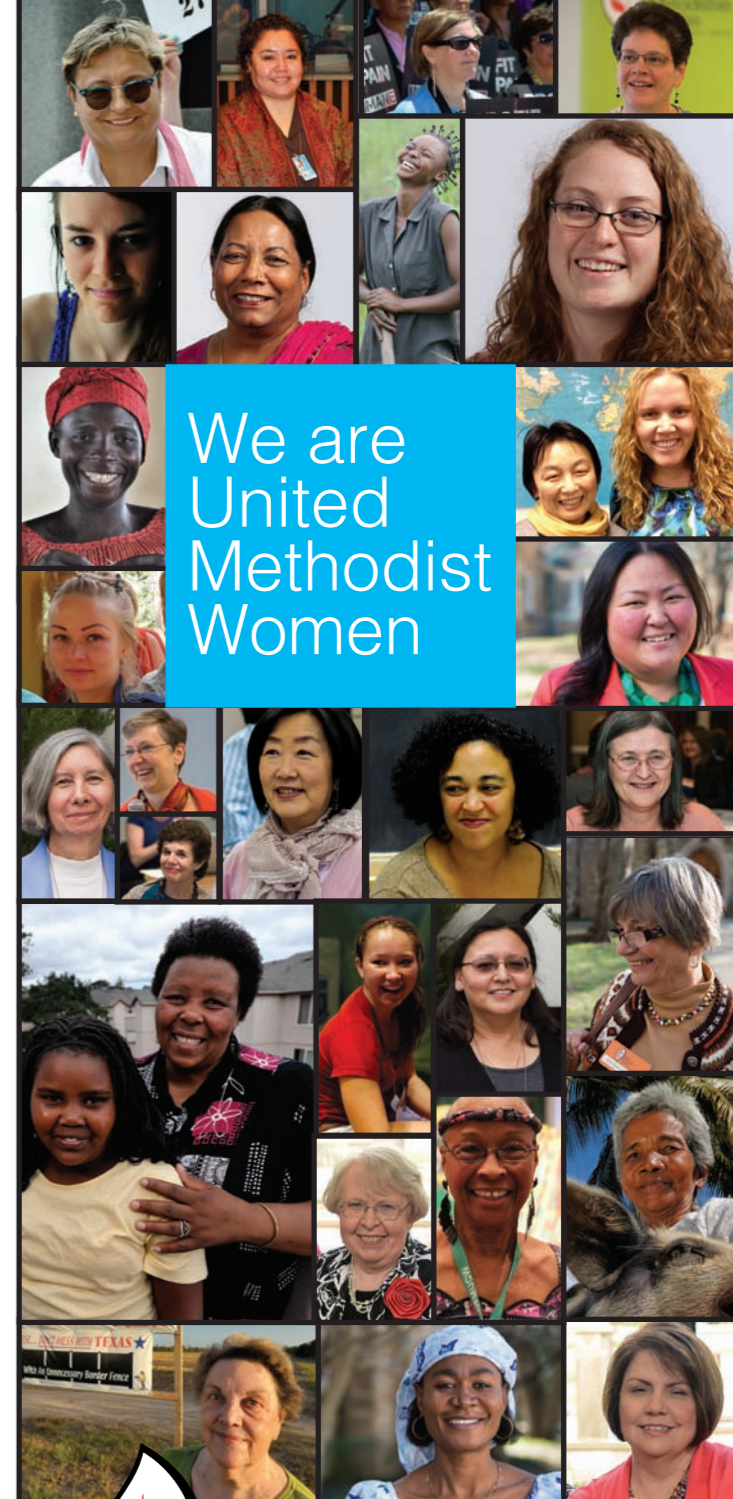
www.facebook.com/UMWomen

[@UMWomen](https://twitter.com/UMWomen)

www.umwmissionresources.org
800-305-9857



Processed chlorine free



We are United Methodist Women



United Methodist Women
FAITH · HOPE · LOVE IN ACTION

What is United Methodist Women?

United Methodist Women is a supportive, inclusive Christian membership organization where women like you grow spiritually, develop as leaders and serve and work to create a world in which all women, children and youth thrive. United Methodist Women is celebrated as the women's ministry of The United Methodist Church.

What does United Methodist Women do?

Our members nurture one another in community and support U.S. and international projects and partners improving the lives of women, children and youth with their prayers, volunteer and advocacy efforts, and financial gifts.



Why should I join United Methodist Women?

United Methodist Women is a community of women committed to mission. As a member you can take advantage of many opportunities, including the following:

- Prayer, Bible studies and spiritual retreats.
- Hands-on mission in local communities.
- Mission education experiences.
- Leadership development and training opportunities.
- Supporting work with women, children and youth.
- Partnership with women in mission in the country and around the world.
- Advocacy for social justice issues, including those pertaining to the environment, domestic violence, immigration and the many other concerns that impact the lives of women, children and youth.
- Engagement in racial justice issues.



How does United Methodist Women support and grow its work?

Our members elect a representative board of directors that sets policy for the organization and determines the places we can make the most impact. Staff and members work to carry out the organization's goals and expectations. Members commit through their financial giving to support the transformation of lives around the world.

Who can join United Methodist Women?

Any woman who commits herself to the PURPOSE of United Methodist Women and to engage in mission, study, personal growth and social action can join. You don't have to be United Methodist or meet an age requirement to be a member.

It's easy to become a member of United Methodist Women: you can talk to someone you know who is already a member, or if you don't know a member, you can call our membership office at **212-870-3725** and learn more online at www.unitedmethodistwomen.org.



PURPOSE of United Methodist Women

The organized unit of United Methodist Women shall be a community of women whose purpose is to know God and to experience freedom as whole persons through Jesus Christ; to develop a creative, supportive fellowship; and to expand concepts of mission through participation in the global ministries of the church.



2021 remittance mail in-dates

Tues, February 23rd

Tues, May 25th

Tues, August 24th

Tues, November 23rd

Mail to:
Kim Shafer
PO Box 480638
Charlotte, NC 28269

REMITTANCE INSTRUCTIONS FOR ALL TREASURERS

For Local Treasurer

Submit the completed remittance form with your check to your district conference treasurer.

For District Treasurer

Complete this remittance form using information from all of the local treasurers in your district. Submit the completed form to your conference treasurer. *Each remittance form is to be mailed with a check to your conference treasurer.*

For Conference Treasurer

Complete this remittance form using information from all of the district treasurers in your conference. *Submit this completed form to the National United Methodist Women treasurer.* You may complete this form on a monthly or quarterly basis. You should make a remittance to the United Methodist Women National Office four times per year. Each remittance form is to be followed by or mailed with a check. To use electronic funds transfer, contact the national treasurer's office.

You may submit the remittance form in several ways:

- Complete the Remittance Form. (To save time, you may fill in the non-changeable items, photocopy the form and then complete that copied form each time.) Photocopy the completed form and mail it to your conference treasurer.
- Download and then mail or email the completed form. The downloadable form is available at, www.unitedmethodistwomen.org/give/forms.

• HOW TO COMPLETE THE REMITTANCE FORM •

MISSION GIVING—Five Channels of Giving

1. Pledge to Mission: This includes Pledge to Mission and supplementary gifts collected on special occasions.
2. Special Mission Recognition: Insert total from Special Mission Recognition local order forms. This form may be sent on its own or attached. On the form, indicate the amount (\$40, \$60, \$100, \$200, \$500, \$1,000, or \$2,000) for each order. Attach copies of local treasurers' orders.
3. Gift to Mission: Insert total from Gift to Mission order forms. Local units order cards from their district treasurer. Cards are sent on a revolving basis. Be sure to have many on hand for a speedy reply to requests.
4. Gift in Memory.
5. World Thank Offering: You may order a World Thank Offering box (M1731, \$0.40) and World Thank Offering label (M5034, free) or download. Go to www.unitedmethodistwomen.org/worldthank for information about ordering resources or downloading materials.

SUPPLEMENTARY GIFTS

6. A Call to Prayer and Self-Denial.
7. Designated Gifts: A Brighter Future for Children and Youth; Assembly Offering; National Mission and International Mission—please provide the names and addresses and amounts of specific projects or enclose a copy of your local treasurers' remittance forms.
8. Legacy Fund.
9. Bequest—please attach a copy of the will or excerpt of the will.
10. Other designated gifts and non-United Methodist Women giving.

TOTAL REMITTANCE

Fill in check number and insert the total of all items.

District treasurers: Write a check in the amount shown on the "total remittance" line made payable to the conference and send to the conference treasurer. Keep a copy for your records.

Conference treasurers: Write a check in the amount shown on the "total remittance" line made payable to United Methodist Women National Office (or use electronic funds transfer) and send to:

United Methodist Women National Office, Gift Processing, P.O. Box 29925, New York, NY 10087-9925.

Always put your name and address in the space provided. Keep a copy for your records.

**UNITED METHODIST WOMEN
THE REMITTANCE FORM
FOR LOCAL UNIT TREASURERS**

Local Unit: _____ District: _____
 Conference: Western North Carolina Period From: _____ To: _____

UNDESIGNATED GIFTS	TOTAL
1. Pledge to Mission	
2. Special Mission Recognition	
3. Gift to Mission	
4. Gift in Memory	
5. World Thank Offering	
Walk for Mission / Other Undesignated Giving	
TOTAL UNDESIGNATED GIFTS (Lines 1 thru 5):	

DESIGNATED GIFTS	AMOUNT		
6. A Call to Prayer and Self-Denial			
7. Supplementary Gifts			
A Brighter Future for Children and Youth			
Assembly Offering			
Scarritt-Bennett Center			
World Communion Scholarships - DISCONTINUED BY GBGM			
Magazine Fund			
National, International, & UMCOR Projects (if additional pages are needed, please complete the Supplementary Gifts -- Details Form)			
<small>NAME OF PROJECT</small>	<small>ADDRESS</small>		
Total from additional page--Supplementary Gifts --Details Form			
SUBTOTAL SUPPLEMENTARY GIFTS (Line 7 only):			
8. The Legacy Fund			
9. Other Designated Gifts			
TOTAL DESIGNATED GIFTS (Lines 6 thru 9):			

TOTAL REMITTANCE Check #: _____ **TOTAL:** _____

Treasurer: _____ Address: _____
 Phone: _____ Fax: _____
 E-mail address: _____ Date: _____

UNITED METHODIST WOMEN

SPECIAL MISSION RECOGNITION

◆◆◆ PIN ORDER FORM ◆◆◆

FOR ALL LOCAL/DISTRICT UNITS

ORDER #: _____ (Please make sure that all orders have a unique order #.)

LOCAL UNIT: _____ DISTRICT: _____

CONFERENCE: _____ PERIOD FROM: _____ TO: _____

◆◆◆ DETAILS OF ORDER ◆◆◆

NAME OF HONOREE	SEND TO	ADDRESS	GIVEN BY	\$ VALUE OF PIN

TOTAL AMOUNT OF PIN ORDER: \$ -

\$40 basic pin, \$60 with sapphire, \$100 with pearl, \$200 with emerald, \$500 with ruby, \$1,000 with diamond, \$2,000 with two diamonds.

Treasurer: _____ Address: _____

Phone: _____ Fax: _____

E-mail address: _____ Date: _____ Check #: _____