

Metro District Treasurer Training

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Catawba Valley District Treasurer Training

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Below are many of the guidelines for Unit Treasurer:

You will receive a letter from me before your reports and pledge to mission monies are to be to be mailed by (or before) the following dates:

- Thursday, February 23rd
 - Thursday, May 25th
 - Friday, August 25th
 - Friday, November 24th
- Anything that comes to me after the deadline will be counted on the next quarter. The UWF year is slightly different from the calendar year so that we can wrap each year up by the end of December.
 - All monies sent to me must be accompanied by a remittance form. 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. Quarterly pledge remittances to Metro District are encouraged, but not mandatory. You can send your remittance semi-annually or annually if that is a better fit for your unit. Remember to be specific about which NATIONAL Line 7 organization you are supporting with Designated giving and include that information on the Remittance form.
 - Checks should be made payable to “**Metro District UWF**”.
 - Making a Pledge to Mission (stating the pledge) is one requirement of being a Mission Today unit. This is easily done using the "2023 Pledge Form". Collect pledge cards from your members – **encourage everyone** to participate. There are many people depending on us!
 - The Pledge now includes all 5 channels of undesignated giving, plus Walk for Mission. 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.
 - 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!
 - You are the financial link between your Unit and the District. You are responsible for submitting your annual budget to your local unit board – a draft form is included with these documents.
 - The 2021-2024 Handbook may be a valuable tool for you.
 - Remember to order Special Mission Recognition pins 4-6 weeks before they are needed. Sylvia/Gaye will send the certificate; pins will come separately from the UWF fulfillment center. The forms can be sent anytime or with the quarterly remittance.
 - I will send you a copy of the remittance forms in my first letter to you in January. They may also be found on the UWF website www.wnccumw.org. Make sure you use the forms for LOCAL units.

- Gift to Mission cards will be available at all District and Conference events, as well as through me. The best time to get them is at the District or Conference events because this saves mission monies in mailing, but mailing is available. Encourage everyone to participate in the Legacy Fund. It is only \$18.69 a month to become a Legacy Builder to improve the endowment. The Legacy Fund is a permanent endowment with generated income that will enable United Women in Faith 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 Women in Faith to enhance programming and launch new initiatives to address emerging needs of women, children and youth.
- Sign up to receive the Metro District and Western NC Conference emails that contain important information. Go to www.wnccmw.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.**
- And remember, Sylvia/Gaye will always be available for any questions, so don't hesitate to call, email me.
- Maintain good local unit records and keep those records for seven years per IRS guidelines. Records should include:

Suggest having a physical or digital notebook helps keep you organized....and that can check with the previous year's notebook, as well as the checkbook, for comparisons on addresses of charities, how much we gave the previous year, etc. Very handy!

- **Deposits** (here I make copies of each deposit slip, including who made out the check, and what it is for (GTM, GIM, circle pledges, World Thank offering, etc)
- **Expenses** (with a sheet for any check I write, including our Quarterly Remittance, detailing every category; reimbursements for expenses; each person or group we "give away our Treasury" (along with a copy of the letter I send to them), etc
- **Bank Statements**, with the date it was balanced with the checkbook
- **Circle Records** (a spreadsheet listing each UWF member, their stated pledge, and each amount they pay during that year)
- **Board Minutes** from each Board meeting
- **Treasurer's Report** (my report in detail each month, listing the previous month's balance, the current month's balance; deposits (in detail); expenses (in detail)
- **Gifts to Mission** and **Gifts in Memory** (a separate column for each, with the names of the recipients, and the amount given for each), which are included in each Quarterly Remittance
- **UWF Forms** from the website
- Have the BUDGET for that year handy, so you can check to see if each item has been paid

Quarterly remittances are due to Sylvia/Gaye Casey/Gaye Dagenhart, 7009 Summer Pl. Charlotte, NC 28213

- Note these date are a month prior to accounting quarter end dates and allow for slower USPS delivery times..
- 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.



United Methodist Women Unit Officer Resource Sheets

Treasurer

Greetings! Thank you for agreeing to be Treasurer of your local unit of UMW. I look forward to getting to know you and to working with each of you. Just a few things to remember:

- You will receive a letter from me before your reports and pledge to mission monies are due, with the first one due on February **28, 2022**. Other reports will be due on May 31, August 31, and November 30. Anything that comes to me after the deadline will be counted on the next quarter. The UMW year is slightly different from the calendar year so that we can wrap each year up by the end of December.
 - All monies sent to me must be accompanied by a remittance form.
 - Checks should be made payable to **“Uwharrie District UMW”**.
 - Making a Pledge to Mission (stating the pledge) is one requirement of being a Mission Today unit. This is easily done using the "2022 Pledge Form".
 - The Pledge now includes all 5 channels of undesignated giving, plus Walk for Mission.
 - You are the financial link between your Unit and the District.
 - The 2021-2024 Handbook may be a valuable tool for you.
 - Remember to order Special Mission Recognition pins 6-8 weeks before they are needed. I will send the certificate; pins will come from the UMW fulfillment center.
 - I will send you a copy of the remittance forms in my first letter to you in January. They may also be found on the UMW website www.wnccumw.org.
 - Make sure you use the forms for LOCAL units.
 - Gift to Mission cards will be available at all District and Conference events, as well as through me.
 - Special Mission Recognition Pins and Cards may be ordered from me any time in the quarter. Be sure to use the correct order form and send a check with your order (along with a remittance form). You can also send everything in quarterly if you wish.
 - And remember, I will always be available for any questions, so don't hesitate to call, email or text me.
-

MISSION GIVING: TELLING OUR STORY

UMW MISSION GIVING

- Pledge to Mission
- Special Mission Recognition
- Gift to Mission
- Gift in Memory
- World Thank Offering

Scripture

Response

*Prayer
Calendar*

*Where The \$
Goes Packet*

Resources

*Telling
Our
Story*

*Program
Book*

HOME
EDUCATION
FOOD
CHILD CARE
LOVE
HEALTH CARE

HOPE

EMPOWERMENT
SKILLS

HOPELESSNESS
OPPRESSION
HUNGER
POVERTY
DESPAIR
REFUGEES

JESUS SAID - "DO YOU TRULY LOVE ME?"

"Feed my lambs....."

"Take care of my sheep....."

"Feed my sheep....."

John 21: 15-17

The Journey of Your Mission Dollar

Through their generosity United Methodist Women members help empower and improve the lives of women, youth and children in the United States and around the world. Here's how it works.

To help fund these projects and more, visit www.unitedmethodistwomen.org/Give



United Methodist Women

FAITH • HOPE • LOVE IN ACTION

Ministries with Women, Children & Youth

Most Pleasant United Women In Faith Yearly Budget

TO DISTRICT TREASURER:

Pledge to Mission	1,935.00	(Suggested items that
Special Mission Recognitions	150.00	may be on a Local
Gift to Mission Cards	50.00	Unit Budget)
Gifts in Memory	50.00	
World Thank Offering	78.00	
		2023 UNITED
		WOMEN
		IN
		FAITH
Call to Prayer & Self Denial	65.00	
A Brighter Future for Children & Youth	75.00	
UMCOR Projects (designated & undesignated)	100.00	
Brooks-Howell Home	100.00	
Conference General Scholarship Fund	50.00	
Conference Love Offering	90.00	
District Love Offering	90.00	
 A&MD:		
Conference Annual Meeting - Delegate (President)	100.00	
Conference Annual Meeting - First Timer Scholarship	100.00	
Mission U - Mission Education and Interpretation Coordinator	75.00	
Mission U - First Timer Scholarship	75.00	
UMW Sunday	150.00	
Reading Program Books	125.00	
Flowers, fruit baskets, etc.	50.00	
UMCOR Kits	100.00	
Mission Studies	100.00	
Hands-On Mission Project (postage)	100.00	
Program Resources	125.00	
Babysitting	100.00	
Miscellaneous (stamps, etc)	50.00	
 LOCAL MISSIONS:	 500.00	
 Total	 4,583.00	

2022 UNITED METHODIST WOMEN PLEDGE FORM

(Return this with your 2021 4th quarter report...or as soon as info is available)

Please return to your District Treasurer

Church Name _____

2022 Pledge to Mission: \$ _____

2022 Local Unit President's Name _____

Street Address _____

City, State, Zip _____

Telephone _____ Email _____

2022 Local Unit Treasurer's Name _____

_____ New Treasurer / _____ Continuing Treasurer

Street Address _____

City, State, Zip _____

Home Phone _____ Cell Phone _____

Email address _____

How do you prefer to receive correspondence? Email _____ Mail _____



Photo: Francois Omenyondo

Mission Giving Pledge Card

Name: _____

Address: _____

Date of Pledge: _____

For the coming year, I pledge \$ _____

to be paid: monthly quarterly other

United Women in Faith MEMBER: Please fill out and return this card to your unit treasurer.

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

Mission Giving Makes Mission Happen!



United
Women
in Faith



Photo: Laurel Akin

Mission Giving Pledge Card

Name: _____

Address: _____

Date of Pledge: _____

For the coming year, I pledge \$ _____

to be paid: monthly quarterly other

United Women in Faith MEMBER: Please fill out and retain this card for your records.

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

Mission Giving Makes Mission Happen!



United
Women
in Faith

Local Treasurer

Thank you for serving as a local treasurer!

Submit this remittance form with your check to your district conference treasurer.

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 to your district treasurer
- Download and then mail or e-mail the completed form. The downloadable form is available at www.unitedmethodistwomen.org/give/forms, or use carbonless copies forms (#5111, free).

• 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 order form. 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.
3. Gift to Mission: Insert total from Gift to Mission order form. You may order cards from your district treasurer using the Gift to Mission order form. This form may be sent on its own or attached. Cards can be ordered singly (\$5) or in packs of 10 (\$50). Christmas cards are in packs of 5 (\$25).
4. Gift in Memory.
5. World Thank Offering.

SUPPLEMENTARY GIFTS

6. A Call to Prayer and Self-Denial
7. Designated Gifts: A Brighter Future for Children and Youth; Assembly Offering; Scarritt-Bennett Center; Magazine Fund; national, international and UMCOR projects—please provide the names, addresses and amounts. If additional lines are needed, please complete the Supplementary Gifts Details Form.
8. Bequest—please attach a copy of the will or excerpt of the will.

TOTAL REMITTANCE

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

Local treasurers: Write a check in the amount shown on the “total remittance” line made payable to the district treasurer. 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		
National, International, & UMCOR Projects (if additional pages are needed, please complete the Supplementary Gifts -- Details Form)		
NAME OF PROJECT	ADDRESS	
Total from additional page--Supplementary Gifts --Details Form		
SUBTOTAL SUPPLEMENTARY GIFTS (Line 7 only):		\$ -









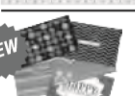

8. The Legacy Fund	
9. Other Designated Gifts	
TOTAL DESIGNATED GIFTS (Lines 6 thru 9):	\$ -
TOTAL REMITTANCE	TOTAL: \$ -

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

GIFT TO MISSION ORDER FORM FOR LOCAL AND DISTRICT UNITED METHODIST WOMEN

Local treasurers order Gift to Mission cards from district treasurers singly or in packs of 10 cards. \$5 per card or \$50 per pack of 10 cards. Christmas cards can be ordered in packs of 5 cards. Minimum \$25 per pack of 5 cards.

Local Unit: _____ District: _____
 Conference: _____ Period from: _____ To: _____

TYPE OF CARD	No. Cards	No. Packs	SENDER ADDRESS	AMOUNT
 New baby (10) M7007				
 Congratulations (10) M7003				
 Peace (10) M7006				
 In the service of Christ (10) M7005				
 On your special day (10) M7008				
 Thank you (10) M7004				
 Thinking of you (10) M7002				
 NEW Thinking of you (10) M7011				
 NEW Happy birthday variety pack (5) M7009				
 NEW Christmas variety pack (5) M7010				

Local treasurers: Send form to your district treasurer. **Total amount of order: \$** _____

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

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

UNITED METHODIST WOMEN

SPECIAL MISSION RECOGNITION

◆◆◆ PIN ORDER FORM ◆◆◆

FOR ALL LOCAL/DISTRICT UNITS

ORDER #:	<small>(Please make sure that all orders have a unique order #.)</small>
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 #:



**Our Western North Carolina
Every Member Legacy Fund Goal:**

That every member of
United Women in Faith
make a gift to

The Legacy Fund
of at least **\$18.69** per year,
over and above her Pledge to
Mission,
for at least five years.

**Celebrate United
Women in Faith!
153 Years and
Counting...**



**United
Women
in Faith**

Western North Carolina

Sustaining Phase, Building On Our Success

As a **permanently invested endowment**, The Legacy Endowment Fund will forever be a source of income for United Women in Faith providing the assurance that United Women in Faith can provide the life-affirming, compassionate care and support that heals, restores and empowers populations of women, children and youth in the years and decades to come. **Every single gift to The Legacy Endowment Fund, of any size, will make a difference!**

In 2014, the national Board of Directors launched The Legacy Endowment Fund Campaign, **setting a goal in 2017 to raise \$60 million dollars**. During the campaign's seven-year history, United Women in Faith **have raised over \$39 million dollars**, surpassing 65% of the \$60 million goal as of December 2021! **Thru March 31, 2022, United Women in Faith in Western North Carolina have given \$440,106.86 to The Legacy Fund! Thank you!**

The Sustaining Phase, builds on the accomplishments achieved during the campaign's seven-year history, strengthening that momentum with a range of activities to help us reach our \$60 Million dollar goal. With additional gifts received in and beyond 2022, United Women in Faith will have access to financial resources that will be used to deepen and expand its mission to transform lives and ignite change in places near and far. Consider joining your legacy with ours and making a gift today.

The Legacy Endowment Fund is second mile giving, after your critically important support of undesignated Mission Giving through Pledge to Mission, Special Mission Recognition, Gift to Mission, Gift in Memory, and World Thank Offering. Thank you for your support of Mission Giving, and The Legacy Endowment Fund!



Endowment Campaign. As of December 31, 2021, we have at least 54 Western North Carolina Conference United Women in Faith who have become Legacy Builders!

More information at: uwfaith.org/give/legacy-fund/

**Where can I get more information about
The Legacy Endowment Fund?**

Visit our website at: wncumw.org/legacyfund/

You can also contact any of our Legacy Campaign Team members, your District President, or your District Treasurer.

Information available on the website includes:

- ◆ Legacy Campaign Commitment Form & FAQ
- ◆ How you can make your gift(s) to The Legacy Fund
- ◆ Variety of Legacy videos & resources to use in your local unit
- ◆ Links to more information on the United Women in Faith National Office website at: uwfaith.org/give/legacy-fund/



**Our Conference Legacy
Campaign Team:**

We are happy to answer your questions,
and to share information with your local unit!

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336-207-3479

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