

# Legacy



FALL/WINTER 2024

American Baptist  
**FOUNDATION**

*Even youths grow tired and weary,  
and young men stumble and fall;  
but those who hope in the Lord will renew their strength.  
They will soar on wings like eagles;  
they will run and not grow weary,  
they will walk and not be faint.*

*Isaiah 40:30-31, NIV*

<b>Greetings</b>	<b>3</b>
Letter from the Executive Director	
<b>Frederick S. and Ann L. Hillier Family Legacy Endowment</b>	<b>5</b>
A Renowned Professor Turns to the American Baptist Foundation	
<b>Legacy Giving</b>	<b>11</b>
IRA Rollovers, Gifts of Stock, Family Endowments, DAFs & much more...	
<b>Strengthening Your Financial Future Program</b>	<b>15</b>
Custom Planned Giving Solutions for Ministries & Missions	
<b>American Baptist Foundation</b>	<b>16</b>
Board & Staff Recognition	

## Our Hope is in the Lord!

I don't know about you, but I find myself barraged by negative messages from every angle these days. From politics to the evening news, story after story has the potential to steal my hope! Fortunately, Isaiah reminds us our real hope does not come from this world, but from the Lord! No matter how tired or weary we become, God renews our strength each day. Our true hope is in the Lord!

Spreading the Good News message is as important today as when Jesus walked the earth. Just as weary people came to hear him share in the sermon on the mountain, they still come to him today to find hope, purpose and meaning.

Through your Estate Planning and Legacy Giving, you help ensure all our American Baptist Ministry family - your local church, ministries across the nation, and mission partners around the world - receive the funds needed to continue even after you are called home. Visit our ABF website at [www.abcofgiving.org/estateplanning](http://www.abcofgiving.org/estateplanning) today to download our Estate Planning Guide, or call our office at (610) 768-2035 to request a visit from a Donor Advisor, and leave a legacy that will bring hope to others for centuries to come!

Yours in Christ,



**Chief Executive Officer**





*Even youths grow tired and weary, and young men stumble and fall; but those who hope in the Lord will renew their strength. They will soar on wings like eagles; they will run and not grow weary, they will walk and not be faint.*

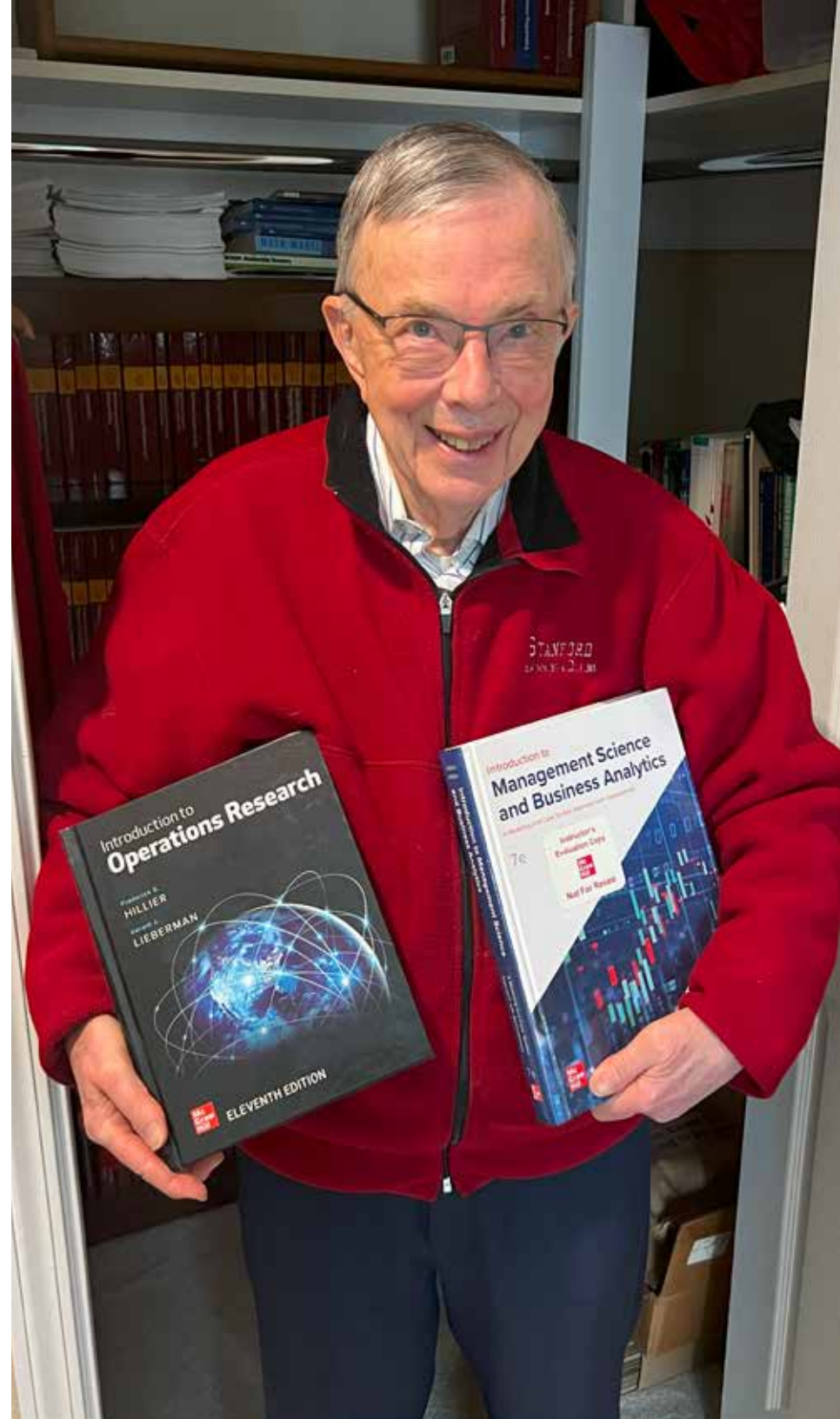
*Isaiah 40:30-31, NIV*



## A Renowned Professor Turns to the American Baptist Foundation

Written by Rev. James Layton

When Dr. Frederick S. Hillier was considering establishing an endowment that would financially support continued American Baptist efforts, he naturally turned to the *American Baptist Foundation (ABF)*. It was a logical decision since multiple American Baptist ministries had blessed him and the previous generation of his family. The Rev. Rick Barlow, an ABF Donor Advisor, provided valuable information that highlighted the Foundation's superb management of endowment funds, which presently total more than \$162,000,000. These represent wise estate planning decisions that have been made by individuals since the founding of the Foundation in 1985.





Rev. Barlow observes:

*“For two decades I have witnessed Dr. Hillier truly exemplify what it means to ‘pay it forward,’ as I connect people who care to ministries that matter. Our collaboration is also a reminder that we ABF Donor Advisors help establish plans that are not transactional only but relational as well, which makes the difference for time and eternity.”*



# Reasons for Showing Appreciation

Fred Hillier's personal appreciation for American Baptist endeavors is traced to his being a recipient of a four-year undergraduate scholarship that made it financially feasible for him to attend Stanford University in Palo Alto, California from 1954 to 1958. He describes the impact of that American Baptist scholarship, saying,

*"It changed my life, and through this **Frederick S. and Ann L. Hillier Family Legacy Endowment** I have a way to express my appreciation to those whose generosity helped me."*



The seeds of that appreciation were also planted by American Baptist ministries that served Fred's mother, Bertha Jonasson Hillier, and his father, Alfred Hillier. They benefitted his uncle, Steine Jonasson, as well. Bertha and Steine's family emigrated from Iceland in 1901.



The Jonassons ventured from their initial location in the U.S. across the country to the state of Washington. Bertha later led her family to become active in the First Baptist Church of Mount Vernon, Washington.



Fred describes what happened next: "My mother earned enough money after high school for only a year at American Baptist-affiliated Linfield College.





But she was such an excellent student that she received a scholarship for her remaining three-years, and in 1925 graduated as the class valedictorian. She subsequently was very active in American Baptist life, including serving as the president for American Baptist Women's Ministries in the state of Washington."



In 1926 "Uncle Steine" also graduated from Linfield. Later he had an illustrious career over several decades as an esteemed history professor at Linfield. He also served some years as the moderator of the McMinnville Baptist Church and as the mayor of McMinnville, Oregon.

Fred's father, Alfred, grew up in a rural area in Alberta, Canada, receiving a meager education in a one-room schoolhouse. Alfred had a brilliant mind, and to provide a college education the family eventually moved to the edge of the Linfield campus in Oregon. They bought some property there that included a house and four cabins, which yielded income as they provided room and board to students.



Alfred graduated as the top-ranked male in the class of 1925. He and the valedictorian of that year, Bertha, were married in the summer. In 1931 Alfred began a significant teaching career at Grays Harbor Junior College in Aberdeen, Washington. He also was extremely active in the Aberdeen Baptist Church and served on the Aberdeen City Council.

It is no wonder that a portion of the family endowment Fred Hillier has established will fund a “rescue scholarship” at Linfield in memory of these three remarkable individuals. Fred states,

*“It will enable students to stay in school, as was the case with my mother, when they don’t have the money needed to continue their studies.”*

## A Professor’s Journey

Dr. Hillier’s career has also focused on higher education. He ranked first in his engineering class of more than 300 students at Stanford University and remained at Stanford to earn his Ph.D. in 1961. He joined the faculty at his alma mater as a professor in a new field, operations research, which involves the application of mathematical models and techniques to decision making. Fred and his Stanford mentor, Gerald J. Lieberman, authored a textbook in 1967, *Introduction to Operations Research*, which had its twelfth printing in 2024. It has been translated into more than 15 languages and has been used by well over a million students. In the light of the value of such work, Dr. Hillier has received numerous awards, including being inducted into the International Hall of Fame for Operations Research in July 2023.



Fred met his wife, Ann, at Stanford. They were married in 1958 and rounded out their family with three children, David, Mark, and John.



For many years the Hilliers held leadership roles in the First Baptist Church of Palo Alto. Ann was particularly active with the homeless ministry. As a memorial to her—having died in March 2023—endowment funding is planned for that type of ministry in association with the American Baptist Home Mission Societies.

To encourage others in establishing endowments that will support vital American Baptist mission and ministries beyond one's lifetime, Dr. Hillier advises:

*“Don’t wait too long to make your estate plans—we don’t live on this earth forever!”*



As 2024 comes to an end, consider the many ways you can help support American Baptist ministries and missions while enjoying tax and income benefits. Here are a few end of the year gift suggestions:

## **Charitable IRA Rollover**

Congress made permanent the law that allows people age 70½ or older who own an IRA to make gifts directly from their IRA to charity. For many people, this is the best tax-wise way to give. An IRA rollover gift will not be included in your taxable income and may qualify for your required minimum distribution. What type of donor are you?....



### **Easy IRA Gift**

Christina is a retired county administrator and a volunteer at her local church. Christina's retirement plan with the county has grown substantially and she has almost \$450,000 in her IRA. Since Christina has all of the income she currently needs, she decided to make a gift of \$2,000 from her IRA to her church. Christina called her custodian and requested a transfer of \$2,000. It was easy for Christina to make the gift and she liked the fact that she could help her church without increasing her taxes.



### **Generous IRA Donor**

Joe is a retired Navy Officer and a regular supporter of American Baptist ministries and missions. He is an avid volunteer and makes annual cash gifts up to the Federal limit. However, Joe wanted to make a one-time gift to a particular ministry for a special project, without exceeding Federal limits or increasing his taxes. Joe decided to make a charitable gift of \$10,000 from his IRA to his desired American Baptist ministry. He was able to continue to make his regular contributions in addition to the IRA gift. The satisfaction he gained from supporting ministry was immeasurable.



### **Major IRA Donor**

Richard is a retired investment advisor. He has watched his IRA blossom and grow through good investments. It now is the largest asset in his estate. Richard is a frequent volunteer for his ABC region and wanted to make a major gift to their endowment held at ABF. So, Richard contacted ABF for assistance. ABF helped through the process of contacting his IRA custodian. Richard had his IRA custodian send \$105,000 directly to his Region to benefit their endowment. He and his CPA were both delighted - Richard made a wonderful gift and his tax situation was simplified.

## ***Gifts of Stock***

An outright gift of stock or other appreciated marketable securities is an excellent way to contribute to ministry while receiving attractive tax benefits. Stocks can also be used to create an income paying gift, such as a CGA or charitable trust.

This option works best for individuals who:

- Have investments that have grown over time
- Are concerned with paying capital gain taxes

There are many planned giving options available to you. Whether it be a gift of life insurance, a bequest through your will, or a gift of real estate, ABF can work with you and your advisors to establish a gift plan that works best for you, your loved ones and the ministries you hold dear.

We are here to answer any questions you may have. ABF will work with your financial advisor or institution as you facilitate your desired gift.

Contact us today by calling (610)-768-2035 or email us at [abfadmin@abc-usa.org](mailto:abfadmin@abc-usa.org)



Many Christian individuals and families desire to remember their favorite ministries and charitable organizations through their current giving and estate plans. One way to accomplish this goal is to establish a legacy, or memorial, endowment bearing the family name or that of a particular family member or friend.

### ***Why establish a Legacy Endowment?***

By establishing a legacy endowment with American Baptist Foundation (ABF), an individual or a family can be certain that the American Baptist ministries and missions they hold dear are supported for years to come. Planting a seed may encourage other family members and friends to add to the fund over time. God has blessed each of us and we have an opportunity to make a difference.

A Legacy endowment creates a chance to communicate your lifetime commitment to American Baptist ministry and mission while providing a living witness that can ensure the continuance of ministry for generations to come.

### Benefits of a Legacy Endowment

- Fund using cash contributions and/or a variety of assets
- Create a charitable deduction
- Produce steady stream of income to support ministries

If you would like to learn more about establishing a Legacy Endowment contact our offices by calling (610)-768-2035.



## ***Donor Advised Fund (DAF)***

### ***What is a Donor Advised Fund?***

A Donor Advised Fund (DAF) is an account you establish with an administrator such as the American Baptist Foundation. Some institutions have minimum amounts and differing distribution requirements. However, all feature one benefit: You give to the fund when you want, then advise the administrator. Just remember this is an “advised” fund, so the administrator is not bound to follow your advice. However, administrators almost always follow the account holder’s advice unless there is a problem with the intended recipient. A DAF is an account authorized by Congress and recognized by the Internal Revenue Service. Each time you contribute to your fund, you receive an income tax deduction.

### ***Is a DAF right for you?***

If you like controlling the timing of your charitable giving and your income tax deduction, then a Donor Advised Fund makes sense. It’s generally easy to establish and is a hassle-free way of giving to your favorite ministries and missions. If any of these benefits appeal to you, then a Donor Advised Fund may be right for you. It allows you more control of your charitable dollars, especially for maximizing your charitable income tax deductions. Your account administrator invests the fund, and you can make gifts to charities from it when you want.

### **Benefits of a DAF**

- Control the timing of your deduction and donation
- Effortlessly give anonymously to charity
- Pass ownership to children or friends to create a legacy

To learn more about benefits and other considerations, please contact us. We welcome the opportunity to answer your questions and work with you and your advisors.

# Strengthening Your Financial Future

## Custom Planned Giving Solutions for Ministry & Mission

The American Baptist Foundation (ABF) is dedicated to enhancing the long-term financial health of American Baptist ministries and missions. We offer various services to promote growth and stewardship. Our Strengthening Your Financial Future (SYFF) program provides tailored solutions to support ministry visions and overcome stewardship challenges.

### VISION

- Helps break down barriers that inhibit stewardship
- Begins with a conversation between ABF and key leaders of your ministry
- Ultimate goal is the development of a customized planned giving program that is tailored to your ministry

### COMMUNICATION

#### *Delivering your stewardship message*

- Clear, concise messaging is critical to realizing success
- ABF assists in developing marketing materials

#### *Planned Giving Education*

- Provide best strategies for giving through: bequests (wills), stock and marketable securities, real estate, life insurance and other planned giving options

#### *Gift Cultivation*

- As interested supporters are identified, ABF has planned giving expertise to work with individuals, families, and their advisors to help ensure that appropriate and effective planned giving options are explored - allowing your ministry to focus on what is most important - communicating your vision

### CELEBRATION

- Successful programs increase ministry awareness and provide greater assurance that your organization will be fruitful for generations to come.
- ABF provides creative ways to celebrate and encourage your members and supporters

**BOARD\***

**Nichole Tillman**  
*Board Chairman*

**Jacqueline Saxon**  
*Board Vice Chair*

**Marcus Pereira**  
*Treasurer*

**Ken Ellison**  
*Secretary*

Michaele Birdsall  
Jesse Brown

Mark Click  
Robert Cochran

Gene Crume Jr.  
Jeffrey Haggray  
Michelle Holmes

James Kelsey  
Sharon Koh  
Donald Ng  
Steve Van Ostran  
Alan Ragland  
Gina Jacob-Strain

**STAFF\***



**Rev. Dr. Christine Roush**  
*Chief Executive Officer*



**Magda Amargos, CGPA**  
*Development Advisor*



**Rev. James Layton**  
*Communications Consultant*



**Muriel Contreras**  
*Marketing & Communications Manager*



**Rev. Rick Barlow**  
*Development Advisor*



**Nicole Harper**  
*Office Manager & Grants Administrator*



**Susan Hall**  
*Development Advisor*



**Lon Krise**  
*Operations Specialist*



**Dawn Jones**  
*SYFF Program Coordinator*



**Nicole Mustacchio**  
*Operations Manager*



**Kristine Lutton, CGPA**  
*Development Advisor*



**Mitch Rohrbach**  
*Controller*



**Paul Weers, CFP®, RICP®**  
*Development Consultant*

\* All names and titles for Board Members and Staff as of 10/15/2024



Thank you to our partners, American Baptist Regions (Multi-Region Corporation), American Baptist Home Mission Societies (ABHMS), and American Baptist International Ministries (IM).

The Foundation encourages the support of these ministries.



### EASY STEPS TO STAY CONNECTED TO ABF ONLINE:

1. Follow and Like us on Facebook and/or Instagram
2. Share our Post with your donors, ministry leaders, friends, family, etc.
3. Visit our website and Subscribe to our eNewsletter



@americanbaptistfoundation



[www.facebook.com/AmericanBaptistFoundation](http://www.facebook.com/AmericanBaptistFoundation)



[www.youtube.com/AmericanBaptistFoundation](http://www.youtube.com/AmericanBaptistFoundation)

For easy access to the following, scan this QR Code using the camera on your mobile device and/or tablet:

- Our website
- Estate Planning Guide
- eNewsletter sign-up
- More resources

