



Report of the Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report

(¶ 2550). Additional reports should be made as requested by the Charge Conference or Church Council or equivalent. Numbers in parentheses refer to paragraphs in the 2020/2024 Book of Discipline.

Copies of this report should be filed with the recording secretary, pastor, district superintendent and the board of trustees.

Church

Charge

District

Annual Conference

For the period beginning

DATE OF PRIOR CHARGE CONFERENCE

, and ending

DATE OF CURRENT CHARGE CONFERENCE

1. Organization for the present conference year was effective ,by electing the following officers (no less than three, and up to nine persons):

	Name	Term Expires
President		
Vice President		
Secretary		
Treasurer		
Member		
Member		
Member		
Member		
Member		

2. a. Is the local church incorporated (¶2529.1a)?
☐ Yes - List the record locator/account number given to the organization by the state:
☐ No

b. Who is the custodian of deeds and other legal papers?
c. Where are they kept?

3. Name or names in which title to each piece of property is recorded, as shown by civil land records (¶¶2536, 2538):

	Name(s)	Office	Book	Page
Church Buildings				
Church Buildings				
Parsonages				
Parsonages				
Other				
Other				

4. Does each deed contain trust clause (¶2503)? ☐ Yes ☐ No

5. Do you have a long-term plan for the replacement of facilities and equipment as they deteriorate? ☐ Yes ☐ No

6. a. Insurance (§2533.2, 2550.7)

Item Insured/ Insurance	Replacement Value	Amount of Coverage/ Limits	Type of Coverage	Company	Restricted By Coinsurance (Yes or No and amount)		Expires When
Church Buildings	\$	\$			Y <input type="checkbox"/>	Amount:	
					N <input type="checkbox"/>		
Parsonages	\$	\$			Y <input type="checkbox"/>	Amount:	
					N <input type="checkbox"/>		
Church Furnishings and Equipment	\$	\$			Y <input type="checkbox"/>	Amount:	
					N <input type="checkbox"/>		
Parsonage Furnishings and Equipment	\$	\$			Y <input type="checkbox"/>	Amount:	
					N <input type="checkbox"/>		
Vehicle(s)/ Commercial Auto		\$					
Hired and Non- Owned Auto Liability		\$					
General Liability		\$					
Medical Payments		\$					
Umbrella/Excess Liability		\$					
Worker's Compensation/ Employers Liability		\$					
Employment Practices Liability		\$					
Employee Benefits Liability		\$					
Directors and Officers/ Errors Omissions		\$			Y <input type="checkbox"/>	Amount:	
					N <input type="checkbox"/>		
Crime/Employee Dishonesty Coverage		\$					
Professional Liability Coverage/ Pastoral Counseling		\$					
Sexual Misconduct Coverage		\$					
Cyber Coverage, if any		\$					

b. Have the buildings been inspected for fire and other safety hazards within the past year? ☐ Yes ☐ No

c. Have you assessed the replacement value within the last 5 years? ☐ Yes ☐ No

d. Who performed the assessment? _____

e. Does the church have a Misconduct Prevention Policy, such as Safer Sanctuaries? ☐ Yes ☐ No

Note: It is recommended that the Misconduct Prevention Policy be reviewed every couple of years, Provide the date last reviewed? _____

f. Is the amount of insurance adequate? ☐ Yes ☐ No

(to determine the adequacy of coverage, please use the GCFA Insurance Worksheet found at:
www.gcfa.org/resource/umc-minimum-insurance-requirements)

7. a. Has an annual accessibility audit for church properties been conducted (§ 2533.6)? ☐ Yes ☐ No
(attach as a report; an example accessibility audit form may be found at www.gcfa.org/forms-and-assets)

b. If needed, have you developed an accessibility plan? ☐ Yes ☐ No (Attach plan)

8. a. Has an annual evaluation been conducted in relation to the church buildings, grounds, and facilities showing the impact on their ability to be carbon neutral and/or have net zero greenhouse gas emissions (§ 2550.11)? ? Yes No
(attach as a report;)

b. If needed, have you developed a plan/timeline for the renovation and development to achieve this? Yes No
(attach plan/timeline)

9. Provide a detailed list of income-producing and permanent funds:

Item	Date Received	Amount	Where Invested	Income	is Used for

(Attach as a supplement a statement “clarifying the manner in which these investments made a positive contribution toward the realization of the goals outlined in the Social Principles of the church and showing the investments are socially responsible...” § 2533.5 and § 2550.9)

President of Trustees

Printed Name: _____

Date: _____

SEND COPIES TO:

1. The recording secretary
2. Pastor
3. District Superintendent
4. The board of trustees.
5. Conference Treasurer office
6. Charge conference of which you are a member and an affiliate member
7. Bishop of the area in which you serve