

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

THE UNITED METHODIST CHURCH

CHURCH COUNCIL and CHARGE CONFERENCE



Annual Report of Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report (§2549). Additional reports should be made as requested by the Charge Conference or Church Council or equivalent. Numbers in parentheses refer to paragraphs in the 2004 *Book of Discipline*.

To the Charge Conference _____, Church District _____, Charge Annual Conference _____, for the year ending _____,

1. Organization for the present conference year was effected _____, _____, by electing the following officers:
 Term Expires _____ Other Members _____ Term Expires _____

President

Vice-President

Secretary

Treasurer

2. Is the local church incorporated (§2528.1)? Yes No

3. a. Name or names in which title to each piece of property is recorded, as shown by civil land records (§§2535, 2537):

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

b. Who is the custodian of deeds and other legal papers?

c. Where are they kept?

4. Does each deed contain trust clause (§2503)?

5. Received during year for constructing and improving church buildings and parsonages and how expended:

Received from	Amount	Disbursements	Amount
	—		—
	—		—
	—		—

6. Present Indebtedness:

Church Buildings \$

Parsonages \$

Other \$

7. Estimated Market value Church

a. Building(s)	—		
b. Furnishings and equipment	—		
c. Land	—	d. Total_	0.00
8. Estimated Market value Parsonage(s)			
a. Building(s)	—		
b. Furnishings and equipment	—		
c. Land	—	d. Total_	0.00

(Over)

ANNUAL REPORT OF TRUSTEES, CONTINUED

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

10. a. Insurance: (§§2532.2, 2549.7)

Item Insured/ Insurance	Replacement Value	Amount Of Coverage	Type Of Coverage	Company	Restricted By Coinsurance (Yes of No and amount)	Expires When
Church Buildings	\$	\$			Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	
Parsonages	\$	\$			Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	
Church Furnishings And Equipment	\$	\$			Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	
Parsonage Furnishings And Equipment	\$	\$			Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	
Vehicle(s)	\$	\$			Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	
General Liability		\$			Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	
Worker's Compensation					Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	
Directors and Officers/ Errors and Omissions/ Crime		\$			Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	
Professional Liability Coverage (Including Sexual Misconduct)		\$			Y <input type="checkbox"/> N <input type="checkbox"/> <i>Amount:</i>	

b. Have the buildings been inspected for fire and other safety hazards within the past year?

c. When was the last full appraisal of church property made?

d. By whom?

e. Is the amount of insurance adequate?

f. Does the church have a Safe Sanctuary policy?

11. a. Has an annual accessibility audit for church properties been conducted (§2532.6)? Yes No (Attach report.)

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

12. Detailed list of income producing property and permanent funds:

(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..." §2532.5 and §2549.9)

Item	Date Received	Amount	Where Invested	Income	How Income Is Used for Ministry
		\$		\$	
		\$		\$	
		\$		\$	

13. Estimated value of other assets (cash, investments, other property, etc.):

Signed _____

President or Secretary, Trustees

Date _____, _____

Prepared and edited by the General Council on Finance
And Administration and authorized as the official form
for this purpose.