**2020-13**

Every local church board of trustees shall submit this report to the charge conference. Copies of this report should be filed with the recording secretary, pastor, district superintendent, and board of trustees. **Do not send a copy to the conference office in Charleston.**

THE UNITED METHODIST CHURCH CHARGE CONFERENCE

## crsflm Annual Report of Local Church Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report (¶ 2550). This report shall cover the period from one charge conference to the next. Numbers in parentheses refer to paragraphs in *The Book of Discipline of the United Methodist Church 2016.* Include information on the parsonage here only if the parsonage is owned by a single church. List trustees who are serving in the current year, not those who are nominated for the coming year.

**Church:**        **Charge:**     \_\_

**District:**        **To the Charge Conference:**    \_\_  , 2020

1.The board of trustees organized for the current year on (date)       , 2020 by electing the following officers:

|  |  |  |  |
| --- | --- | --- | --- |
| Current (2020) Officers of the Board of Trustees | Year Term Expires | Other Current Trustees | Year Term Expires |
| President: |  |  |  |
| Vice President: |  |  |  |
| Secretary: |  |  |  |
| Treasurer: |  |  |  |
|  | |  |  |

2. a. Name or names in which title to each piece of property is recorded, as shown by civil land records (¶2536, 2550.2):

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Property | Name(s) | Tax District | Book | Page |
| Church building |  |  |  |  |
| Parsonages (if owned by a single church) |  |  |  |  |
| Other property |  |  |  |  |

b. Who is the custodian of deeds and other legal papers? (¶ 2550.8)

c. Where are they kept? (¶ 2550.8)

3. Does each deed contain the trust clause? (¶2503)

4. Received during the year for constructing and improving church buildings or parsonages, and how expended (¶ 2550.5):

|  |  |  |  |
| --- | --- | --- | --- |
| Received from | Amount | Disbursements | Amount |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

5. Present Indebtedness (¶ 2550.6): Church Buildings $        Parsonages $        Other $

6. Estimated Market Value (¶ 2550.1): Church a. Building(s) $

b. Furnishings and Equipment $

c. Land $

d. Total $

ANNUAL REPORT OF LOCAL CHURCH TRUSTEES, *CONTINUED*

7. Estimated Market Value (¶2550.1): Parsonage(s) a. Building(s) $

b. Furnishings and Equipment $

c. Land $

d. Total $

8.a. Insurance: (¶2533.2, 2550.7)

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Item insured/Insurance | Replacement Value | Amount of Coverage | Type of Coverage | Company | Coinsurance amount (if any) | Expires When |
| Church Buildings | $ | $ |  |  |  |  |
| Parsonages (if owned by this church alone) | $ | $ |  |  |  |  |
| Church furnishings and equipment | $ | $ |  |  |  |  |
| Parsonage furnishings and equipment | $ | $ |  |  |  |  |
| Vehicle(s) | $ | $ |  |  |  |  |
| General Liability | ------- | $ |  |  |  |  |
| Worker’s Compensation | ------- | ------- | ------- |  | ------- |  |
| Directors and Officers/Errors and Omissions/Crime | ------- | $ |  |  |  |  |
| Professional Liability Coverage (including sexual misconduct) | ------- | $ |  |  |  |  |

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

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

d. By whom was it made?

e. Is the amount of insurance adequate?

9. a. Has an annual accessibility audit for church properties been conducted (¶ 2533.6)? Yes  No

b. If needed, have you developed an accessibility plan? (¶ 2550.10) Yes  No

10. Detailed list of income producing property and permanent funds (¶ 2550.4):

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Item | Date Received | Amount | Where Invested | Income | How Income is Used |
|  |  | $ |  | $ |  |
|  |  | $ |  | $ |  |

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

12. Does the church have a safe sanctuary policy? Yes  No  Is it on file at the district office? Yes  No

Where there is no church policy, the Conference safe sanctuary policy becomes the church policy.

The conference policy is our policy. Yes

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

President or Secretary, Trustees