**2023-12**

*(Submit this form if you have a parsonage or other property which is owned jointly by two or more churches)*

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.**

THE UNITED METHODIST CHURCH CHARGE CONFERENCE

Annual Report of Charge Trustees

The trustees are amenable to the Charge Conference and as such are required to make an annual report (¶2528.3)

Numbers in parentheses refer to paragraphs in the 2016 Book of Discipline.

**Charge:**        **District:**

**To the Charge Conference:**       , 2023

1. The charge board of trustees organized for the current year on (date)       , 2023 by electing the following officers: *(list* ***current*** *charge trustees,* ***not*** *those who are being nominated for the coming year)*

|  |  |  |  |
| --- | --- | --- | --- |
| Current (2023) 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):

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Name(s) | Tax District | Book | Page |
| Parsonage |  |  |  |  |
| Second Parsonage |  |  |  |  |
| 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 parsonage(s), and how expended (¶ 2550.5):

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

5. Present Indebtedness (¶ 2550.6): Parsonage(s) $        Other $

ANNUAL REPORT OF CHARGE TRUSTEES, *CONTINUED*

6. Estimated Market value (¶2550.1): Parsonage(s) a. Building(s) $

b. Furnishings and Equipment $

c. Land $

d. Total $

7.a. Insurance: (¶2533.2, 2550.7) ***Be sure to provide complete information. Insurance information will be provided to the conference board of trustees for a study of the adequacy of insurance throughout the conference.***

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Item insured/Insurance | Replacement Value | Amount of Coverage | Type of Coverage | Company | Coinsurance amount (if any) | Expires When |
| Parsonage(s) | $ | $ |  |  |  |  |
| Parsonage Furnishings and Equipment | $ | $ |  |  |  |  |
| Directors and Officers/Errors and Omissions/Crime | ------- | $ |  |  |  |  |
| Professional Liability (Including Sexual Misconduct) | ------- | $ |  |  |  |  |

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

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

d. By whom was it made?

e. Is the amount of insurance adequate?

8. Detailed list of income producing property and permanent funds held by the charge trustees (¶2550.4):

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

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

10. Is the parsonage fully accessible to the handicapped?

11. If the parsonage is not fully accessible, how and when will this be remedied? Attach additional sheets if necessary.

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

President or Secretary, Charge Trustees