

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



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