

***When completed, email this form to ccforms@minnesotaumc.org.**

Church _____ City _____ District _____ Form 10

2021 Report of the Trustees (Form 10: page 1 of 5)

Trustees are elected by the Charge Conference to act as its agent in caring for the physical resources of the church and for all legal matters. The Trustees report at least annually to the Charge Conference (§2550) about the state of the church's property, equipment, investments and resources in their care. In all matters, Trustees receive guidance from the Charge Conference (§2529) before acting for the church.

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

IMPORTANT DOCUMENTS: Examples of important documents include Articles of Incorporation, Bylaws, abstracts, deeds, mortgages, satisfaction of mortgage. These documents are needed when buying or selling property or receiving bequests.

1. Who is responsible for legal papers?
2. Where are the papers filed?
 - a. Articles and bylaws
 - b. Deeds, abstracts, mortgages, leases, and others relating to property
 - c. Other—list and give location

INCORPORATION

1. Is the local church incorporated (§2529.1)? Yes No
2. Under which Minnesota statute is your church incorporated? 315 317A

See memo about incorporation on the Minnesota Annual Conference UMC web site at www.minnesotaumc.org/corporate-legal-property. Both forms of incorporation require at least two different communication methods for a Church/Charge Conference. Status 315 requires 15 days advance notice (with the exception of 30 days advance notice if sale of property is involved). Status 317A requires 14 days advance notice.

Sample Articles of Incorporation can be found in the GCFA Legal Manual, Section 2: Local Church, page 30 at www.gcfa.org/services/legal-services/legal-manual/.

3. If incorporated, is the name of your church the same as contained in your Articles of Incorporation? What is the corporate name?
4. If you are a 317A corporation, have you filed your annual renewal on-line with the Minnesota Secretary of State's office? Yes No

To check whether you are a corporation in Good Standing in compliance with Minnesota law, please visit the Secretary of State's web site at <https://mblsportal.sos.state.mn.us/Business/Search> by keying in the name of your corporation. If no records are found, change Filing Status option to "Inactive" and search again.

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ELECTION OF TRUSTEES AND OFFICERS OF THE CORPORATION

5. On _____, the Charge/Church Conference of _____ (name of church) met and elected the following persons as Trustees (§2525, 2526):

Name	Term Expires	Name	Term Expires

6. On _____, the above listed Board of Trustees met and elected the following officers (§2530) (*see note at end of form)

President: _____ (Name)

Vice-President: _____ (Name)

Secretary: _____ (Name)

PROPERTY INFORMATION:

7. Name or names in which title for each piece of property is recorded, as shown by civil land records (§2536, 2538). Please verify the name of the church as listed on each deed:

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

8. Does each deed contain trust clause (§2503)? Yes No

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

Received through	Amount	Disbursements	Amount

10. Present Indebtedness:

Church Buildings \$ _____

Parsonages \$ _____

Other \$ _____

11. Estimated Market value: Church

a. Buildings(s) \$ _____

b. Furnishings and equipment \$ _____

c. Land \$ _____

d. Total \$ _____

12. Estimated Market value: Parsonage(s)

a. Buildings(s) \$ _____

b. Furnishings and equipment \$ _____

c. Land \$ _____

d. Total \$ _____

13. How were the values for the above determined (insured value, county tax assessment, professional appraisal or other)?

14. Do you have a long-term plan in place for the replacement of facilities and equipment as they deteriorate?

Yes No

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INSURANCE

15. a. Insurance: (¶¶ 2533.2, 2550.7)

Item Insured/ Insurance	Replacement Value	Amount of Coverage	Type of Coverage	Company	Restricted by Coinsurance? (Yes or No and amount)	When Expires
Church Buildings	\$	\$			Yes No \$	
Parsonages	\$	\$			Yes No \$	
Church Furnishings and Equipment	\$	\$			Yes No \$	
Parsonage Furnishings and Equipment	\$	\$			Yes No \$	
Vehicles	\$	\$			Yes No \$	
General Liability		\$			Yes No \$	
Worker's Compensation					Yes No \$	
Directors and Officers/ Errors and Omissions/ Crime		\$			Yes No \$	
Professional Liability Coverage (Including Sexual Misconduct)		\$			Yes No \$	

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

c. Is the amount of insurance adequate? Yes No

To determine adequacy of coverage, refer to the current (revised in November 2019) minimum insurance requirements information from GCFA found at <https://www.gcfa.org/services/legal-services/minimum-insurance-requirements/>.

d. Does the church have a Safe Gatherings policy? Yes No

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16 a. Has annual accessibility audit for church properties been conducted (§ 2533.6)? Yes No

(Attach report.)

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

(Examples of accessibility audit forms may be found at <http://www.gcfa.org/forms-and-resources/local-church-forms/>).

17. 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. . . ." § 2533.5 and § 2550.9)

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

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

_____ \$ _____
_____ \$ _____

Signature of President or Secretary, Trustees _____

Date _____

Note:

For an incorporated church:

As was stated at the beginning of this form, Trustees are elected by the Charge Conference to act as its agent in caring for the physical resources of the church and for all legal matters. As such, on legal documents such as deeds, mortgages and forms from financial institutions requesting the signature of the president or secretary, this refers to the officers of the corporation and should be the Trustees elected by the Trustees to fill those positions.