



The Financial Dashboard

Communicating church finances clearly & easily

You can probably count on your fingers the number of people in a church meeting who are interested in the usual line-item budget. Even church leaders find themselves frustrated when time comes to review church finances. Many don't understand what financial documents are telling them, and others just glaze over at the sight of all those numbers. And when budgets or statements are presented in a non-standard manner, even the financially savvy can become confused.

Like a car's dashboard, the financial dashboard conveys important information in a format that's quick to comprehend. Presented in line graphs, pie charts and other graphic options, financial data is condensed to an appropriate level and conveyed clearly. By its nature, the financial dashboard offers limited data, as over-communication of detail can often do more harm than good.

To encourage generous givers, church leaders must build trust in the management of the church's funds — and that trust begins with clarity. As the saying goes: less is more. Budgets and financial statements that cover more than one or two pages, that provide tons of detail, or that omit important elements of the church's financial situation can cause confusion and raise questions in church members' minds. Questions can lead to conflict, which in turn can breed mistrust.

When developing a financial dashboard, consider that most church members primarily want the big picture: how are we doing on giving and income? are our actual results on-target with the budget? where is our money being spent? Choose the information appropriate to your audience and the occasion — then provide the information in a graphic format that is useful, appealing and easy to understand.

A SNAPSHOT

- Remember less is more!
- A good rule of thumb for presenting financial information: the larger the audience, the more summarized the information should be.
- Most people comprehend financial data more easily when information is presented in a simple, clear and colorful graphic format.
- The items included on a financial dashboard can change, providing the data most useful to the occasion & audience.
- When presenting a financial dashboard, be sure to have a traditional document handy for those who prefer more in-depth information.

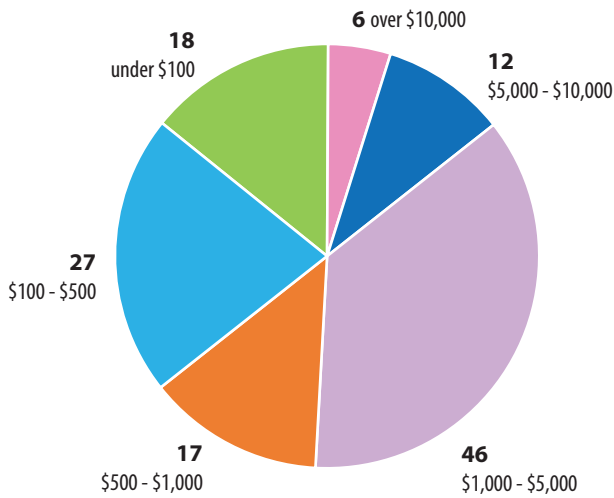
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OUR CHURCH BY THE NUMBERS

Our church continues to grow and our leadership is making sure spending remains in line with income. And while our overall giving increases each year, our giving per member has been decreasing. We are increasingly reliant our largest donors, with 67% of our budget coming from our top 25 givers. Our leadership has also identified a goal of decreasing our spending on facilities so that we may achieve our church goal of spending at least 10% of our budget each year on missions & OCWM.

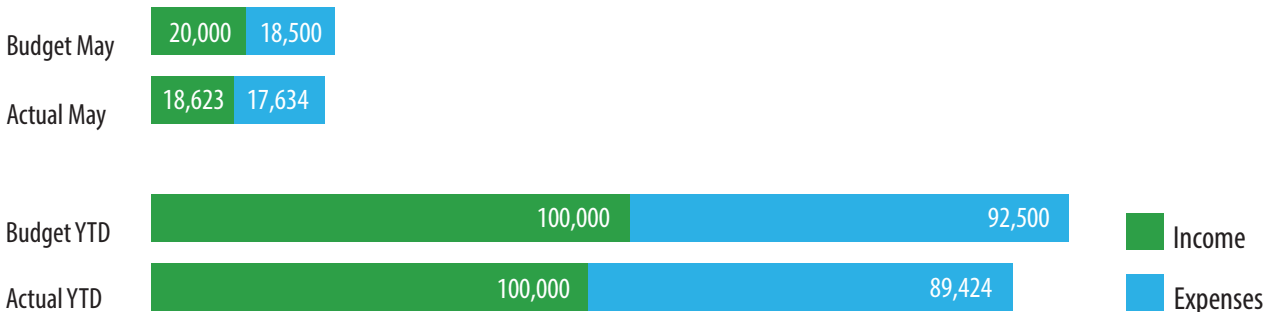
Distribution of annual giving

Over \$314,000 was given by 126 giving units, with 37% giving \$1,000 to \$5,000, while 5% give over \$10,000.



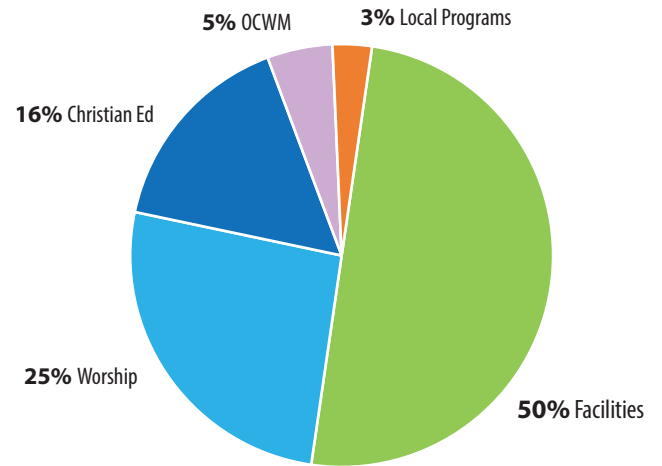
Budget vs. actual for the month & year-to-date

While we continue to run a bit behind our budget in giving, we have reduced spending to remain in line.



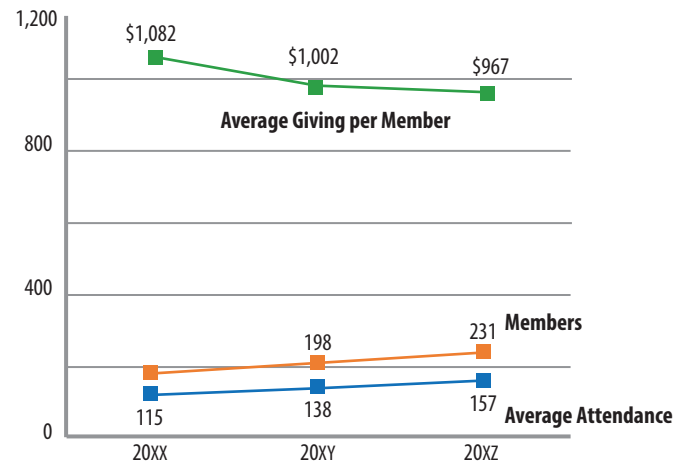
The ministry funded by our gifts

Half of our budget goes to the use and maintenance of our building and grounds, with 8% to missions.



Giving, membership & attendance

While attendance and membership have been increasing, the average gift per member continues to decline.



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