FORM #9
YEAR 2025

Susquehanna Conference
The United Methodist Church

CHARGE:
CHURCH:
DISTRICT:

Church Trustees Report

For the period beginning January 1, 2025 and ending December 31, 2025

Due January 31, 2026

See *The Book of Discipline* 2020/2024, ¶ 2550, for further information.

Church Name	**Chair of Trustees**
Charge	**Chair of Trustees Address, phone & email**

1. What appraised values are to be reported?	
a. Church Building(s) Give physical address for each. 1. 2. 3. 4.	 1. $ 2. $ 3. $ 4. $
b. Equipment & Furniture 1. 2. 3. 4.	 1. $ 2. $ 3. $ 4. $
c. Land 1. 2. 3. 4.	 1. $ 2. $ 3. $ 4. $
d. Is there a cemetery associated with this church? Is it church owned? Is there a cemetery association? Are plots available for purchase? Will there be future burials? Cemetery (Name and physical address) 1.	Cemetery Association name and contact information:
e. Total of Cash, Investments, Other Assets	$
f. Total Value of Church (property and assets)	$

Copies to Conference Superintendent, Pastor, Chair of Trustees and Recording Secretary

g. Parsonage or Building (s) Give physical address(es) 1. 2.	 1. $ 2. $
h. Church-owned Parsonage Furnishings/Equipment 1. 2.	 1. $ 2. $
i. Parsonage Land	$
j. Escrow Accounts for Parsonage	$
k. Total Parsonage Value	$
l. Other Property or Assets (specify)	$
2. Is this church incorporated?	
If yes, are the conditions of that Incorporation followed? (For information on becoming incorporated contact your District Superintendent)	
3. Do all deeds contain the trust clause? See ¶2503	
4. Legal Documents a) Where are the deeds and legal papers kept? b) Who has access to them?	 a) b)
5. Were there "critical risk recommendations" noted by the Conference property and casualty insurance carrier in the last year?	
Were those "critical risk recommendations" addressed to the satisfaction of the insurance carrier?	

6. What bank accounts, bequests, trusts, certificates of deposit, and/or invested funds are entrusted to the Trustees? List each and provide the following items of information for each: (a) amount, (b) name of institution and address, (c) annual income, (d) how used, (e) compliance with Social Principles.

ITEM	***AMOUNT***	***NAME OF INSTITUTION AND ADDRESS***	***ANNUAL INCOME***	***HOW USED***	***COMPLY*** ***w/ Social Principles? ¶160-166***

7. Are regular reports on the above funds made to the Church Council (or Administrative Council/Board)?	
8. Report Present Indebtedness (including Conference covenantal commitments)	
Item	***Indebtedness Anticipated End***
9. Address of Rental or Income producing property	**Annual Income Received:**
Is there a lease agreement? End of lease date? Attach lease, if Parsonage is rented - attach to Form 5	
10. Has your church sold, purchased, built or renovated a property during the past year?	**Date these changes were reported to the Insurance Company:**
If not reported, identify the person who will report it and the date it will be reported:	
a. Address of Sold Property	Sale Price:
b. Address of Purchased Property	Cost:
c. Address of New Construction	Cost:
d. Address of Renovation or Demolition	Cost:
11. Does your church have any of the following programs?	If yes, you must fill out Form 9a Weekday Children's Ministry Programs
a. Daycare	
b. Nursery School	
c. Preschool	
d. Other -	
12. Accessibility – are the buildings fully accessible? a. Church b. Parsonage	 a. b.

13. Does the church own any motor vehicles or trailers? A. List year, make and model for each: **B. Who is the insurer?**	1. 2. 3. B.
14. Is your church's Safety Team Lead registered on Conference Website	☐ Yes ☐ No
15. Is the church or parsonage prone to flooding? **A. Who is the Flood insurance carrier:**	15. A.
Has a water sensor been installed in the Church Parsonage? ☐ Yes ☐ No	

All churches are encouraged to do an annual Safety Inspection which form can be found at susumc.org - Finance&Administration - Property&Casualty Manual pp. 44-49

Signature of Chair of Trustees Date