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## Denominational Resources and Foundations

*This section is clearly not inclusive of the many denominations which exist today. However, we include these references for your initial use. Please contact your own denomination for more resources.*

### **American Baptist**

#### **American Baptist Foundation**

[www.abcofgiving.org](http://www.abcofgiving.org)

Socially responsible investing (SRI) reflects our American Baptist values, enabling investors and donors to participate in investment strategies that support their beliefs. American Baptist Foundation (ABF) adheres to the broad social screens adopted by American Baptist Churches USA, prohibiting investments in firms primarily involved in gambling, defense and weapons, tobacco, and alcohol. Additionally, ABF and our investment managers may implement additional screens from time to time. Under the direction of our finance committee, our investment consultants and money managers constantly review our holdings to help ensure that our investments satisfy our SRI mandates. While most ABF equity investments are in large stocks, there are also investments in some medium, small, and foreign company stocks. Ensuring that our investments satisfy social screens can be challenging; however, we have proven to be very capable in this area. ABF is considerate toward the social and environmental needs of our community, nation, and environment.

### **Church of the Brethren**

#### **Brethren Foundation Inc. (BFI) and Brethren Foundation Funds Inc. (BFFI)**

[www.cobbt.org/about-us-0](http://www.cobbt.org/about-us-0)

Brethren Foundation Inc. and Brethren Foundation Funds Inc. provide deferred gift and investment opportunities for members and organizations of the Church of the Brethren, as well as others who affirm Brethren Values Investing guidelines. BVI guidelines, which are based on positions of the Church of the Brethren as expressed by its Annual Conference action, exclude companies that generate 10 percent or more of their revenue from Department of Defense contracts, weapons and their components, abortion, alcoholic beverages, defense, gambling, tobacco, or pornography. Companies engaging in human rights violations, as well as consistent violators of environmental regulations, are also excluded. In addition, the twenty-five largest publicly traded US defense contractors are excluded. As shareholders,

BFI and BFFI initiate and participate in shareholder engagement with corporations. BFFI also offers a Community Development Investment Fund through which organizations put their invested assets to work funding affordable housing, microlending, and other community development initiatives.

### **Community of Christ**

[www.cofchrist.org](http://www.cofchrist.org)

Community of Christ offers member jurisdictions the option to pool funds for investment for the pursuit of operational and missional opportunities. The church is sensitive to the intent of World Conference resolutions, and the desire of membership to invest in companies with ethical environmental, social, and corporate governance practices. Community of Christ endeavors to invest in companies that demonstrate a high awareness of products and processes that are environmentally friendly, leave a minimal footprint, and promote sustainability; socially, they implement internationally recognized human rights standards; corporately, they uphold financial, social, and ethical governance structures. Community of Christ endeavors not to invest in companies that produce products or use processes that are toxic to the environment; manufacture defense industry equipment, such as armaments, weapons, or munitions; use child labor and sweatshops; or generate tobacco, alcohol, gaming, or pornography. We believe following these principles will help meet commitments to beneficiaries and better align our investment activities with the broader interests of society.

### **Disciples of Christ**

#### ***Christian Church Foundation***

[www.christianchurchfoundation.org](http://www.christianchurchfoundation.org)

The Christian Church Foundation helps achieve the vision of the Christian Church (Disciples of Christ) through planned giving, endowment funds, and other avenues through which donors can charitably distribute their gifts within the church and the world. The Christian Church Foundation works with individual donors and local congregations to determine their passion for ministry and discern together the best way they can use their gifts to support ministry. The Christian Church Foundation is a member of the Interfaith Center on Corporate Responsibility (ICCR) and engages with companies to be socially and environmentally responsible. Each of the Christian Church Foundation funds reflects the organization's dedication to socially responsible investing. The Bostick Select Fund, launched in 2019, upholds this commitment while excluding investments in fossil fuels, weapons manufacturers, and companies targeted for divestment because of their involvement in perpetuating the Israeli-

Palestinian conflict. The goal of the Christian Church Foundation is to move money to mission while helping Disciples make a difference in the world.

## **Episcopal**

### ***Episcopal Church Foundation***

*[www.episcopalfoundation.org](http://www.episcopalfoundation.org)*

ECF partners with congregations, dioceses, and other Episcopal faith communities, empowering them to engage in strategic visioning and planning, develop effective lay and clergy leadership teams, and raise and manage financial resources for ministry, including capital campaigns, investment management, planned giving resources, and life income gift and donor-advised fund options. ECF's programs, products, and services help congregations respond to the changing needs of the Episcopal Church in the twenty-first century.

With nearly \$400 million in investments from 300 clients, ECF has helped hundreds of Episcopal dioceses, churches, schools, and church-related organizations *organize, invest, and grow* their endowments and permanent funds. Our Endowment Management Solutions (EMS) program covers the complete spectrum of endowment needs, from starting an endowment fund, to updating endowment policies, to investing prudently, including socially responsible (SRI) and environmental, social, and governance (ESG) options, and guidance on spending wisely. ECF's commitment to responsible endowment management reflects our belief that endowments breathe new life into a congregation, make new ministries possible, spark creative outreach projects, and ease the burden of long-term capital expenses.

### ***The Episcopal Church (Domestic and Foreign Mission Society)***

Episcopal Church SRI site: *[www.episcopalchurch.org/library/topics/socially-responsibleinvesting](http://www.episcopalchurch.org/library/topics/socially-responsibleinvesting)*.

## **Evangelical Lutheran Church in America**

### ***ELCA Foundation***

*[www.ELCA.org/foundation](http://www.ELCA.org/foundation)*

The ELCA Foundation, a ministry of the Evangelical Lutheran Church in America (ELCA), supports members and congregations with planned giving and endowment management services. Designed specifically for its congregations and affiliated ministries, the Endowment Fund Pooled Trust—Fund A allows for the collective long-term investment of funds and provides distributions to support ministries throughout the church and world.

Portico serves as the investment manager for multiple asset class portfolios within Fund A and, where possible, uses a socially responsible investing approach in these portfolios. This approach is in alignment with ELCA social teachings and policies and uses ELCA guidance on social criteria screens, shareholder advocacy (i.e., shareholder filings, proxy voting, dialogues), and where possible positive social

investments (e.g., community economic development, companies taking steps toward a sustainable environment). The eight ELCA social criteria screens used include alcohol, environmental damage, gambling, military weapons, pornography, private prisons, tobacco, and human rights.

#### **Lutheran Church—Missouri Synod**

##### ***Lutheran Church—Missouri Synod Foundation***

[www.lcmsfoundation.org](http://www.lcmsfoundation.org)

The LCMS Foundation serves the 2-million-member Lutheran Church—Missouri Synod in two areas: helping church members to make estate gifts and assisting ministries with their investment needs. The Foundation utilizes an outside investment advisor and best-in-class fund managers to construct portfolios that are consistent with the goals of our donors and ministries. In managing over \$800 million in assets entrusted to us by others, we seek to align the investment options we offer with the values of our church body.

The majority of the Foundation's fund managers utilize SRI/ESG factors as a component of their evaluation of potential investment opportunities. Additionally, we further screen our investments to exclude companies that participate directly in the production of abortifacients.

With sixty years serving the church and more than \$1 billion in gifts distributed to ministries of the church during that time, the LCMS Foundation seeks to continue that legacy of assisting donors and ministries with spreading the gospel for generations to come, until Christ returns in glory.

#### **Mennonite**

##### ***Everence Foundation (formerly the Mennonite Foundation)***

[www.everence.com](http://www.everence.com)

Everence Foundation is part of the Everence family of financial services and has helped individuals, congregations, and organizations since 1952, offering gift plans and charitable services. As a donor-advised foundation, Everence Foundation is designed to make giving easier, more flexible, and as simple as possible. In 2018, donors contributed \$49 million through Everence Charitable Services, and \$59.6 million in distributions was made based on donor recommendations. A full range of charitable services are available that include donor-advised funds, charitable trusts and gift annuities, planned giving, legacy planning, and the use of values-driven and impact investments. At Everence, a stewardship ministry of Mennonite Church USA, generosity is an important part of developing and carrying out overall financial

planning, helping individuals and institutions integrate their faith and finances.

**Presbyterian Church (USA)**

***Presbyterian Foundation***

*[www.presbyterianfoundation.org](http://www.presbyterianfoundation.org)*

A vital part of the Presbyterian Church (USA), the Presbyterian Foundation cultivates, attracts, and manages financial resources of individuals and institutions to further Christ's mission. We work to strengthen congregations and related mission and ministry efforts by developing gifts and managing funds on their behalf. We work with them to build communities of generosity among their members and constituents. Our team of dedicated ministry relations officers across the United States regularly visit churches and Mid Council organizations to partner with them, offering stewardship, planned giving, endowment, and many other resources that can help sustain mission and ministry until Christ comes again. Additionally, the Foundation's subsidiary, New Covenant Trust Company, provides a means for individuals, ministries, and congregations to invest in ways that are consistent with Presbyterian values. In all our work, we remain focused on the Reformed values that have guided our stewardship and investment for more than 200 years.

**Religious Society of Friends (Quaker)**

***Friends Fiduciary Corporation***

*[www.friendsfiduciary.org](http://www.friendsfiduciary.org)*

Friends Fiduciary Corporation (FFC) is a Quaker nonprofit organization providing cost-effective, socially responsible investment management services exclusively to Quaker meetings, churches, schools, and organizations. FFC manages over \$470 million for more than 390 constituent organizations across the country. We faithfully steward these assets in ways consistent with Quaker values. Friends Fiduciary is a manager of managers, selecting best-in-class investment managers who implement Quaker socially responsible investment criteria for specific asset classes. We are active investors in the companies we own, engaging in company dialogues, filing shareholder proposals, and voting proxies. We believe Quaker values are also good, long-term, sustainable business values, and we seek to witness to those values on Wall Street, both as a testament to our faith and to maximize the long-term value of our investments.

**Roman Catholic**

*Depending on the legal structure of the Roman Catholic diocese, individual parishes may or may not be able to hold their own invested or endowed funds. Finance councils may check with their local diocese finance office regarding ways to participate in SRI/ESG. Larger Roman Catholic organizations oversee their own investments and SRI strategy, but smaller*

*mission dioceses work with the well-known organization Catholic Extension (below), for their SRI investment and planned giving needs. You may also review the full description of the United States Conference of Catholic Bishops (USCCB) SRI guidelines at [www.usccb.org/about/financial-reporting/socially-responsible-investment-guidelines.cfm](http://www.usccb.org/about/financial-reporting/socially-responsible-investment-guidelines.cfm).*

### **Catholic Extension**

[www.catholicextension.org](http://www.catholicextension.org)

Based in Chicago, Catholic Extension offers financial support to eighty-six under resourced Roman Catholic mission dioceses throughout the United States. Through fundraising from individuals, we support the poorest places in this country, where faith communities face enormous hardships and rely heavily on their faith and their church to confront these challenges. Their faith reminds them that they are not alone and offers hope, confidence, and optimism to move ahead with their lives, against all odds. Through strategic investment initiatives available to mission dioceses and other Roman Catholic organizations, we are meeting the unique pastoral, operational, and financial needs of faith communities. Programs such as the Mission Diocese Fund, with over \$150 million under management, multiply the impact of our donors' gifts while providing the opportunity for dioceses to access top-level investment funds that would otherwise be outside their financial capacity.

### **Unitarian Universalist Association (UUA)**

[www.uua.org/finance/investment](http://www.uua.org/finance/investment)

The Unitarian Universalist Common Endowment Fund (UUCEF) is available for the investment of endowment funds, trust funds, and other assets of Unitarian Universalist congregations and organizations that have a long-term investment perspective and the need for income to support their missions. Under oversight of the Unitarian Universalist Association (UUA) Board of Trustees, the Investment Committee selects professional outside advisors and investment managers utilizing criteria set forth in the UUA investment policies, which direct that investments be in alignment with UU values. The Fund brings investors an added dimension—an active program of Socially Responsible Investing (SRI), which consists of making investment decisions that reflect UU values and contribute to positive social and environmental change. The three main strategies of SRI are investment selection, shareholder engagement, and community investing. "Investment selection" means using social, environmental, and governance (ESG) criteria in selecting our investments and excluding companies that are incompatible. "Community investing" is directing a portion of our investments in a way that helps to ameliorate poverty

and social inequality. And by “Engagement” we mean working to improve the environmental and social performance of the companies whose securities we own. The UUCEF gives UU congregations a powerful and wide-ranging impact on corporate behavior and other issues of deep concern to Unitarian Universalists. These SRI initiatives represent an effective way to bring UU ideals to the marketplace. Specifically, shareholder advocacy and proxy voting initiatives seek to give investors a way to have UU values represented and to change the behavior of US and multinational corporations.

### **United Church of Canada**

#### ***The United Church of Canada Foundation***

*[www.unitedchurchfoundation.ca](http://www.unitedchurchfoundation.ca)*

The United Church of Canada Foundation has always striven to ensure that our investments are consistent with both the values and mission of the Church and our fiduciary responsibilities as trustees. The national investment bodies of the United Church of Canada’s Treasury, Pension Fund, and Foundation see the growing importance of responsible investing as affirmation of our belief that corporate responsibility and long-term performance are not mutually exclusive but are complementary. We embrace responsible investment (RI) because it reflects our central goal of providing returns aligned with values.

The national investment bodies are signatories and/or members of various bodies that encourage institutional investors to act as good stewards of their members’ capital through the integration of ESG factors and active ownership (monitoring, engagement, and voting) practices. The national investment bodies support that:

- responsible investing is a positive force influencing corporate behavior through encouraging responsible actions;
- responsible investment is more than negative screening;
- engagement can be a powerful tool to change corporate behavior;
- promoting ESG issues in the companies in which we invest serves both parts of our mandate: to generate good financial returns while honouring the values of our organizations and the denomination.

## **United Church of Christ (UCC)**

### ***United Church Funds***

[www.ucfunds.org](http://www.ucfunds.org)

Established in 1909, United Church Funds (UCF) offers a family of thirteen professionally managed, well-diversified, and socially responsible investment funds to over 1,000 churches, conferences, associations, and other ministries of the United Church of Christ. At present, UCF manages over \$800 million in assets—from small church reserve accounts to some of the denomination's historic endowments.

Investors in UCF's funds benefit from a range of advantages, including

- faith-based investing and endowment solutions
- diversified funds that span the spectrum of risk and return
- competitive performance and attractive fee structures
- more than 100 years of supporting the mission of our clients
- nonprofit, values-aligned, and committed to improving the world

Investing with United Church Funds, churches and other UCC ministries enjoy the best practices of modern portfolio management while remaining faithful to the values of the United Church of Christ. We seek solid investment performance with a purpose: to make more money available for your ministry.

## **United Methodist**

*For a United Methodist foundation that serves your local regional conference, please check with your local regional leadership.*

### ***UMC Foundation Investment Management***

[www.investumc.org](http://www.investumc.org)

UMC Foundation Investment Management is built on a solid foundation of stewardship and generosity—reflected in our mission. Started in 2000 as the United Methodist Church Foundation, we collaborated with agencies, foundations, and institutions of the United Methodist Church, with a faithful calling and commitment to creating a better world. At the time, the United Methodist Church Foundation had two main functions: to work with partners to create lasting financial legacies through gifts and endowments, and to invest and manage those funds. In 2014, the fundraising and gift development component of the Foundation separated from the investment management division. With investment management becoming our primary focus, our team now concentrates on offering expert institutional investment management with innovative, personalized service.