

## Investing With the Foundation

The Georgia United Methodist Foundation, in partnership with Wespath Institutional Investments, delivers advanced faith-based financial solutions that elevate the mission and ministry of your church or nonprofit.

### Who We Are

- Leading financial partner to Georgia-based Methodist churches, nonprofits, individuals, and families
- 501(c)(3) not-for-profit agency
- Our mission is to provide faith-based financial solutions for investing, lending, training, and planned giving
- Total assets entrusted to our care: \$234 million<sup>1</sup>
- Fifth largest United Methodist foundation in the U.S.
- Dedicated team of eight professionals

### Solutions Offered

- Institutional Investments
- Loans for Churches and Nonprofits
- Certificate Investments
- Endowments and Legacy Ministry Programs
- Wills Clinics
- Cemetery Associations
- Financial Literacy Academy
- Scholarships

## Institutional Investment Fund Options



**U.S. Equity Fund:** Seeks to earn long-term capital appreciation from a broadly diversified portfolio of primarily equities of companies domiciled in the U.S.



**International Equity Fund:** Seeks to earn long-term capital appreciation from a broadly diversified portfolio of primarily equities of non-U.S. domiciled companies.



**Multiple Asset Fund:** Seeks to maximize long-term investment returns, including income and capital appreciation, while reducing short-term risk by investing in a broad mix of investments.



**Fixed Income Fund:** Seeks to earn current income by investing in a broadly diversified portfolio of fixed-income instruments.



**Inflation Protection Fund:** Seeks to provide investors with current income and protect principal from loss of purchasing power due to inflation.

<sup>1</sup> As of December 31, 2023.

# Our Partnership With Wespath Institutional Investments

Investing with Wespath Institutional Investments (WII) through the Georgia United Methodist Foundation allows your organization to focus on its own good work while reaching its financial objectives.



## Not-for-Profit

WII is a subsidiary of Wespath Benefits and Investments (Wespath), an agency of the United Methodist Church. 100% of its clients are not-for-profit, faith-based investors.



## Longevity

Wespath brings more than 100 years of investment experience—tracing its roots back to 1908. A 21-strong team of investment industry veterans brings the strength of experience.



## Scale

Wespath manages one of the world's largest reporting faith-based pension funds. Together with its subsidiaries, including WII, Wespath manages nearly \$26 billion<sup>2</sup> in assets.



## Diversification

WII offers a series of funds designed to build well-diversified, global portfolios and provide access to world-class investment managers.



## Alignment of Interests

WII is inherently free of many conflicts observed with other financial institutions.

## Partnership

Our goal now and in the future is to support your mission and the continued mission of the Methodist church in Georgia.

## Impact

When you partner with us, you can join in being a global leader in sustainability. Integrating environmental, social, and governance issues into our investments is integral to our process.

## Performance

Our priority is your financial future. Our disciplined investment approach seeks to deliver long-term, competitive performance.

<sup>2</sup> As of December 31, 2023.

Wespath claims compliance with the Global Investment Performance Standards (GIPS®). GIPS® is a registered trademark of CFA Institute. CFA Institute does not endorse or promote this organization, nor does it warrant the accuracy or quality of the content contained herein. For more information on GIPS®-compliant performance information please contact [InvestmentInfo@wespath.org](mailto:InvestmentInfo@wespath.org).

## Contact Us

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