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The Georgia United Methodist Foundation (GUMF) is pleased to provide you with this exclusive Investment Quarterly Review. GUMF is the exclusive distributor of the I Series of the Wespath Institutional Investments (Wespath) funds to United Methodist entities within the State of Georgia.

Market and Wespath Fund Performance¹

- **Fund Performance:** Net-of-Wespath-fees performance through June 30, 2021, is available [here](#).
 - **Markets at a Glance Video Update:** Wespath Chief Investment Officer Dave Zellner [provides a video update on the markets](#).
 - **Monthly Investment Report:** Read Wespath's full market and fund performance commentary in the [June 2021 Monthly Investment Report](#).
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Wespath Quarterly Webinar – Now on Demand!

- Wespath's *Investment Insights* second quarter webinar is now available! Watch as their investment team recaps investment activity and details economic trends from the second quarter. Check out the full webinar or view it by section: [here](#).
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Legal Aspects of General Conference 2022 Planning

- Wespath's Andy Hendren recently provided his insights on recent Church events, governance, and legislation topics in a presentation for investors. Watch Andy's segment [here](#).
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Sustainable Investment Report Published

- The newly released report provides an overview of Wespath Benefits and Investments and its subsidiaries' ² organization-wide approach to sustainable investments and shares highlights from 2019 and 2020—including its latest work on climate action, its COVID-19 response, engagements on human rights, the 30-year anniversary of the Positive Social Purpose Lending Program and more. [Read now](#).
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Other Wespath Sustainable Investment Quarterly Highlights

- **Investment Insights Blog – Shareholder Engagement Explained:** Why do investors file shareholder resolutions on environmental, social, and governance (ESG) issues? Wespath explains this important tool for shareholder engagement with an example of an engagement on human rights risk—check it out [here](#)!

New Thought Leadership

- **Investment Insights Blog – Should You Be Worried About Inflation Right Now?** Those with an eye on economic news have likely noticed plenty of recent chatter about increased inflation. In the latest blog post, Wespath's Dave Zellner examines the causes and explains why Wespath adheres to a long-term investment approach. [Read here.](#)

2020 Annual Report Now Available

- **Wespath Benefits and Investments' 2020 Annual Report:** 2020 was a year unlike any we have ever experienced. Learn about how the unprecedented events of last year impacted markets, economies and Wespath's investment funds in the 2020 Annual Report, available [here.](#)

Andy Hendren Elected as Wespath Benefits and Investments' Next General Secretary and CEO

- Wespath Benefits and Investments' Board of Directors has elected Andrew (Andy) Hendren as Chief Executive Officer and General Secretary-elect. His service as CEO and General Secretary begins on **January 3, 2022**. Andy currently is the chief legal and governance officer. He will succeed Barbara Boigegrain, who will retire after serving in the role for more than 27 years. Read the press release [here.](#)

¹ Rates of return reflect past performance and are no guarantee of comparable future results. The prices of the I Series funds will rise and fall with the value of the investments held in the funds, so investors may lose money. Investment results shown reflect the deduction of all fees incurred by the I Series funds, including investment management, custody and administrative and operating expenses. They do not, however, reflect the deduction of GUMF administrative fees. Investors should consider investment objectives, risks, charges and expenses before investing. This and other information is contained in Wespath's [Investment Funds Description – I Series.](#)

² Wespath Benefits and Investments implements the sustainable investment strategies for investment funds made available through it and its subsidiaries, including Wespath Institutional Investments.

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Wespath Institutional Investments is located at 1901 Chestnut Ave., Glenview, IL 60025.

Contact Us

Investing with Wespath Institutional Investments through the Georgia United Methodist Foundation allows your church or organization to focus on its own good work, while reaching its financial objectives. To learn more, visit gumf.org or contact:



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