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

Foundation Hosts Online Investment Forum With Wespath Institutional Investments October 19 at Noon



Are you interested in a global market update from Wespath, manager of one of the largest faith-based pension funds in the world? Together, Wespath and its subsidiaries, including Wespath Institutional Investments, manage over \$29 billion in assets as of December 31, 2021.

The Georgia United Methodist Foundation is the exclusive distributor of the I Series of the Wespath Institutional Investments funds to United Methodist churches and nonprofits in the State of Georgia. On **Wednesday, October 19 at noon**, Foundation President and CEO Mathew A. Pinson will host a 45-minute complimentary webinar featuring Wespath Chief Investment Officer Dave Zellner and Director, Institutional Relationships Karen Manczko. The agenda includes:

- Welcome and Introductions
- About the Georgia United Methodist Foundation
- Wespath Institutional Investments Overview and Review of the Foundation's Investments
- Market and Economic Updates
- Questions and Answers
- Conclusion

To join the webinar on October 19 at noon, please click the link below:

<https://us02web.zoom.us/j/85271939514>.

Registration is not required.

Read the bios of Dave Zellner and Karen Manczko [here](#).

The webinar recording will be shared online at gumf.org. To learn more, please contact the Foundation at 770-449-6726 or info@gumf.org.

JOIN THE WEBINAR

Market and Wespath Fund Performance¹

- **Fund Performance:** Net of Wespath-fees performance through September 30, 2022, is available [here](#).
- **Key Takeaways from Third Quarter's Markets:** After a challenging start to the year, third quarter's markets provided no reprieve for investors as they continued to face generational-high inflation, hawkish Fed policy, bond losses, an energy crisis in Europe, and a looming global recession. Wespath Managing Director Joe Halwax breaks it down in [Wespath's Q3 commentary](#).
- **September Investment Report and Video Recap:** Piotr Chwala, Wespath Manager of Private Markets, [provides a video update](#) on September's markets, including another Fed rate hike, policy missteps by the U.K. government, record-high appreciation by the U.S. dollar, and more. Wespath's full [Monthly Investment Report is available here](#).

Wespath Sustainable Investment Quarterly Highlights²

- **["ESG" Strikes a Nerve, Why it Shouldn't](#):** The term "ESG" has been receiving criticism in the media, but is it warranted? Wespath CIO Dave Zellner argues "no." His op-ed published by Top100funds.com explores common critiques of ESG and why he believes investing sustainably is a proactive strategy that adds value for investors.
- **[Midwest Investors Diversity Initiative \(MIDI\) for Increased Board Diversity](#) :** MIDI is an investor coalition working to increase racial and gender diversity on corporate boards. Wespath's coalition has now worked with 70 Midwest-based companies, and they are pleased to announce that 95 women and persons of color have received board appointments. Read more about Wespath's progress in this press release.

Fiduciary Focus Educational Series

- **[The Importance of a Sound Planned Giving Strategy](#) :** Wespath's *Fiduciary Focus* article shares how developing a comprehensive "planned giving" strategy can set not-for-profit organizations on the path to long-term financial success.
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New Thought Leadership on the *Investment Insights* Blog

- [“Fed” Up With Inflation, the Fed Continues to Raise Rates](#) : This time last year, inflation was labeled as transitory (or temporary). Fast forward a year, and the Fed has hiked interest rates again to account for soaring inflation. Evan Witkowski, Wespath Manager of Institutional Investments, shares more about the unprecedented change in Fed expectations, how it has affected markets and the Fed’s future predictions.
 - [Uncovering Asset Manager Talent: An Asset Manager Due Diligence Overview](#) : Wespath looks to invest with exceptional asset managers and hold them to the highest standard. Learn more about Wespath’s robust, repeatable and holistic investment due diligence process, detailed by Mark Warren, Wespath Manager of Public Equities.
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Video Resources

- [Unscripted: Rob Nicoski of Disciplined Growth Investors](#) : Rob Nicoski of Disciplined Growth Investors (DGI) sits down with Wespath’s Mark Warren to discuss DGI’s philosophy of buying for long-term value, culture of open idea generation, and how they’ve “turned patience into an artform.”
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¹ *Historical returns are not indicative of future results. The Wespath investment funds are neither insured nor guaranteed by the government. For more information about the funds, please see the Wespath [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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