



## Faith-Based Financial Solutions | Investment Services Driven by Your Mission

*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.*

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### Market and Wespath Fund Performance<sup>1</sup>

- **Fund Performance:** Net-of-Wespath-fees performance through September 30, 2021, is available [here](#).
  - **Markets at a Glance Video Update:** Wespath's Trent Sparrow, Manager, Impact Investments, [provides a video update on the markets](#), including the U.S. Federal Reserve's tapering, inflation concerns, a U.S. Congressional debt ceiling showdown and economic uncertainty in China.
  - **Monthly Investment Report:** Read Wespath's full market and fund performance commentary in the [September 2021 Monthly Investment Report](#).
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### Wespath Announces Compliance with the Global Investment Performance Standards (GIPS®)<sup>2</sup>

- This quarter, we announced that Wespath now claims compliance with the Global Investment Performance Standards (GIPS).<sup>2</sup> Introduced in 1999, the GIPS standards are international, voluntary standards based on the fundamental principles of full disclosure and fair, consistent representation of investment performance. [Please read our full announcement here](#).
  - Wespath has also recently published a paper titled, "[A Quick Guide to the GIPS Standards](#)," which explores the GIPS standards' history and why investors seek GIPS standards-compliant investment managers.
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### Wespath Sustainable Investment Quarterly Highlights<sup>3</sup>

#### **Responsible Investor Op-Ed**

- Through its membership in the Net-Zero Asset Owner Alliance, Wespath co-leads an asset manager engagement working group focused on empowering asset managers to drive the transition to a net-zero economy. It shares this work in an [op-ed published via Responsible Investor](#), a leading digital publication covering sustainable finance.

#### **Investment Insights Blog – IPCC Climate Change Report**

- In August, the Intergovernmental Panel on Climate Change ("IPCC") released a groundbreaking report on climate change. [In this blog post](#), Wespath's Jake Barnett – Director, Sustainable Investment Stewardship – highlights its key findings and explains how climate factors can impact your investments.

## New Thought Leadership

### **Fiduciary Focus Educational Series – Asset Allocation Factors for Mission-Focused Investors:**

- The latest article in the series shares the factors mission-focused investors should consider when developing an asset allocation. [Read it here.](#)

### **Investment Insights Blog – What is Federal Reserve Tapering, and Why Does it Matter?**

- Have you heard about the Fed's "tapering" plan and wonder what it means for the market? In this blog post, Frank Holsteen – Wespath's Managing Director, Investment Management – explains the U.S. Central Bank's monetary policy tools and how the winding down of quantitative easing might play out. [Check it out here.](#)

### **Investment Insights Blog – Risk Management for Institutional Investors: To Avoid, or to Control?**

- In investing, complete risk avoidance is rarely the best option; instead, investors need to think about their process in terms of risk control. Wespath's Karen Manczko – Director of Institutional Relationships – highlights some key risk management considerations [in this blog post.](#)

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<sup>1</sup> Historical returns are not indicative of future results. The investment funds are neither insured nor guaranteed by the government. For more information about the funds, please see the [Investment Funds Description – I Series](#)

<sup>2</sup> In the above context, "Wespath" is representative of Wespath Benefits and Investments, Wespath Institutional Investments and UMC Benefit Board, Inc.

<sup>3</sup> 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.

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## 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](http://gumf.org) or contact:



**Mathew A. Pinson**  
**President and CEO**

Georgia United Methodist Foundation  
770-449-6726 (Office)  
[mpinson@gumf.org](mailto:mpinson@gumf.org)



**Dr. Laudis H. "Rick" Lanford**  
**Regional Vice President**

Georgia United Methodist Foundation  
478-256-7130 (Cell)  
[rlanford@gumf.org](mailto:rlanford@gumf.org)



