



## **10 Reasons to Invest Your Church's Funds With The California-Nevada United Methodist Foundation**

The California-Nevada United Methodist Foundation is part of the connectional family. Through our stewardship services to local churches, agencies and individuals, we build and maintain long-term relationships with our partners in ministry.

1. The Foundation seeks to assure income exceeding investment benchmarks so as to allow churches to support their mission and ministry, and individuals to make planned gifts.
2. Two carefully selected professional asset managers – Nelson Capital Management and the Golub Group – provide a diversity of management styles and philosophies within the universe of high quality securities. Their performance regularly meets or exceeds the S&P 500. (View our Investment portfolio and current performance at our website – [www.canvumf.org](http://www.canvumf.org))
3. All holdings are screened to ensure they comply with our United Methodist Social Principles and The Book of Discipline. Our asset managers were selected because they are leaders in the area of Socially Responsible Investing.
4. Our Investment services allow church leaders and staff to spend time focusing on their ministries, and provides investment continuity as church leadership changes.
5. Our Investment Committee, composed of a number of experienced professional and personal investment overseers, provides oversight of our asset managers and shepherds the investments for our account holders.
6. The pooling of funds for investment allows different investment vehicles that might not be available to individual investors, providing a higher level of service to the account holders, and more advantageous fee arrangements with money managers. We offer a choice of four different fund options that allow churches to balance risk and return.
7. The CA-NV UMF is a self-supporting stewardship ministry. The administrative fees we charge are used only to support the work of the Foundation on behalf of our clients and for the ministries of the CA-NV Annual Conference. Every United Methodist individual and organization has access to our planned giving and endowment development services.
8. Quarterly reports are issued to all account holders to provide adequate tracking of account transactions and investment history.
9. We provide distributions to each account holder as requested, reducing the burden on account holders to access funds in a timely manner. Our professional staff is very responsive to those we serve.
10. The Foundation is audited annually by an outside certified public accounting firm.

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