

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. **Performance** of the funds entrusted to the Foundation is consistently competitive, providing our account holders with funds to further mission and ministry.
2. Two carefully selected professional asset managers –Bailard and Summitry – provide a **diversity of management styles** and philosophies within the universe of high quality securities. (View our Investment portfolio and current performance at our website – www.canvumf.org)
3. All holdings 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. Our **administrative fees are low**, and are used only to support the work of the Foundation on behalf of our clients. Every United Methodist individual and organization in our conference has access to our planned giving and endowment development services at no charge.
8. Account holders receive **detailed quarterly reports** to provide 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.

1350 Halyard Drive, West Sacramento, CA 95691

Executive Office: Phone: 916-813-1974 Email: davidm@canvumf.org
Finance Office: Phone: 707-578-4048 Email: cherik@canvumf.org