

**Growing ministry  
through values-  
aligned investing**

# Investing with a Mission: Performance Beyond the Numbers

United Church Funds (UCF) is the leading provider of investment management and planned giving services to the United Church of Christ (UCC) churches and ministries, and serves faith-based organizations beyond the UCC.

UCF offers socially responsible investment funds designed to help faith-based organizations grow and preserve their financial legacies.



## Professional Management

As a knowledgeable and experienced partner, UCF provides a strategic array of funds and services designed to help you achieve your financial objectives.



## Strategic Asset Allocation

Each fund is managed to deliver competitive performance and long-term value to achieve the fund's objective.



## Dedicated Infrastructure

UCF combines financial experts, industry veterans and a wealth of valuable resources to help mission-driven, faith-based clients invest successfully.



## Continuous Oversight

All funds are actively monitored and undergo continuous evaluation, enabling us to react quickly as markets or investing needs change.

Serving as **a trusted investment partner for churches and faith-based organizations for over 100 years**, UCF has an in-depth understanding of your unique financial needs and goals — as well as the guiding principles and missions that inspire you.



*What is the kingdom of God like? And to what should I compare it? It is like a mustard seed that someone took and sowed in the garden; it grew and became a tree, and the birds of the air made nests in its branches.”*

Luke 13: 18-19

## Strengthening Ministries with Sound Investing

Savings, gifts and endowments fuel the ministry and lay the foundation for future generations. And like a mustard seed, even small accounts can grow into considerable resources when managed with care and expertise.

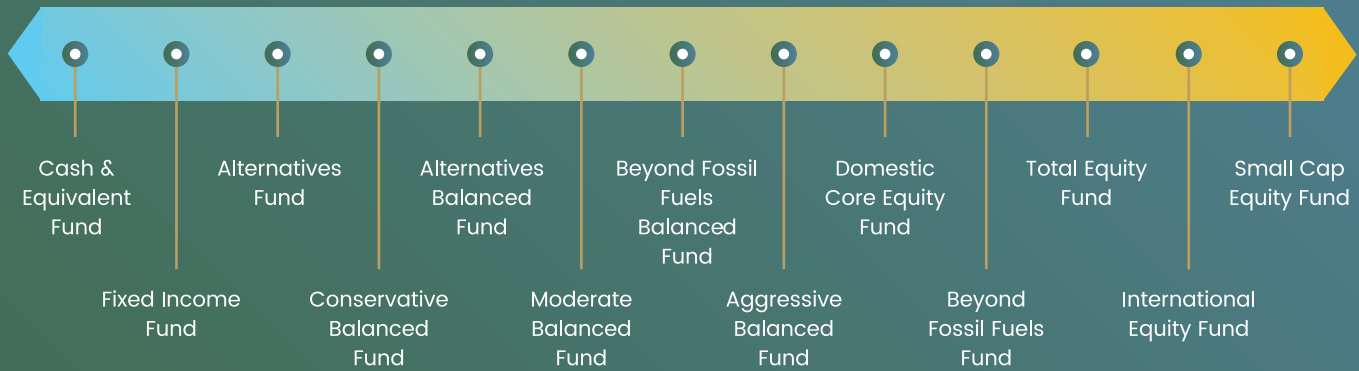
With a family of **traditional investment funds and three alternative options**, UCF provides flexible and diverse investment options designed for spending and long-term growth.

Our family of funds enables your church or ministry to customize its portfolio according to your risk tolerance, time horizon and return objectives.

## Risk / Reward Continuum

LOW

HIGH



## Socially Responsible Investing: Invest in Your Values

Your investment portfolio should reflect your mission and purpose. Leveraging a three-tier approach to socially responsible investing, UCF combines shareholder engagement, proxy voting and exclusionary screens—empowering your organization to align its values and morals with its investment.

As your trusted partner, we put your ministry's needs and interests first, making socially responsible investments that help achieve permanent and meaningful change in today's corporate practices.

## Ministry Stewardship Through Planned Giving

As part of our ministry, we help UCC churches and ministries launch and integrate planned giving into their existing endowment programs, and provide the resources necessary to maximize these initiatives.

Personalized educational resources and marketing tools we offer:



PLANNED GIVING MANUAL



WEBINARS



BROCHURES



MICROSITE DEVELOPMENT



Leveraging these resources, your church or ministry can help individuals and families express their values and commitment to faith-based causes and missions. Options for structuring planned gifts include:

- 1 | A Will Bequest
- 2 | A Charitable Gift Annuity
- 3 | Participating in the UCF Pooled Income Fund
- 4 | A Charitable Remainder Trust
- 5 | Gifts from life insurance, an IRA, real estate or appreciated assets

To make planned giving a part of your ministry's fundraising initiatives, our team can help you determine which structure best meets your goals and benefits your church or ministry.

## The Highest Standards of Service

United Church Funds provides Wall Street expertise with a Main Street approach to client service. As a faith-based ministry, our mission is to guide and support like-minded organizations by creating the resources necessary to establish and promote a long-term legacy for future generations.

UCF also sets itself apart from commercial investment firms by offering competitive performance at the lowest possible cost.

Additional benefits to having UCF as your partner include:



Personalized client services



Free unlimited subaccounts



No maintenance, transaction or distribution fees

Managing investments for faith-based organizations takes more than knowledge and skills. It requires a personal, human touch to be a true ministry partnership. At UCF, we understand your needs and goals, and the values that drive your ministry's work. Working together, we can help you create a foundation for a bright and secure future.

**Working together, we can help you create a foundation for a bright and secure future.**



Faith-based  
investing and  
endowment  
solutions



A family of  
diverse funds that  
span the risk and  
return spectrum



Competitive  
performance  
and attractive  
fee structures



Over 100 years  
of supporting  
the mission of  
our clients



Non-profit,  
values-aligned  
and committed  
to improving  
the world



# A Legacy of Investment Excellence

Established in 1909, UCF's mission is to provide our clients with competitive, values-aligned investment performance. We do this by offering socially responsible funds that align with the UCC's shared values and the educational resources necessary to ensure a sustainable endowment for future generations.

For more information on investing or planned giving through UCF, please contact our team.



**(877) 806-4989 / Toll free**



[info@ucfunds.org](mailto:info@ucfunds.org)



United Church Funds  
475 Riverside Drive, Suite 1020  
New York, NY 10115-1097