United Church Funds
Investing Together for a Sustainable World

Trustee Checklist: A Guide for Fiduciaries

Use this checklist to get the most out of the tools and resources that UCF provides to church financial leaders in fulfillment of their fiduciary and stewardship responsibilities around investment assets. Contact our team at **info@ucfunds.org** with any questions.

- [ ] **Visit UCF Website**
  Familiarize yourself with the UCF website. There you'll find up-to-date information on UCF's investment performance, responsible investing, planned giving resources and transaction forms.

- [ ] **Utilize Client Portal**
  Access your UCF account(s) through the Client Portal under the Client Access link to download monthly and/or quarterly statements, or prepare a report (annually at a minimum) of your current investment holdings and share them with your fellow committee members.

- [ ] **Update Authorized Officer(s)**
  Review your church or organization's current list of authorized officers. If updates are necessary, use the Change of Authorized Officers form under the News and Resources tab on the website.

- [ ] **Subscribe to Monthly Newsletter**
  Ensure that key officers and committee members receive the UCF monthly newsletter for important updates. Individuals may subscribe at https://ucfunds.org/subscribe/ and unsubscribe anytime.

- [ ] **Register for Quarterly Town Hall**
  Register for UCF's quarterly Town Hall Meetings, which are held live virtually on Zoom. These sessions offer updates on organizational news, market trends, performance and responsible investing, with a Q&A opportunity. UCF sends email reminders and registration links after each quarter end.

- [ ] **Review Investment Policy Statements & Asset Allocation**
  Periodically review your investment and endowment policies. Your UCF Institutional Relationships team member can provide recommendations and guidance if your church or organization does not have policies in place.

- [ ] **Schedule Portfolio Review**
  If it has been more than two years since your church or organization has had a portfolio review, schedule a meeting with an Institutional Relationships team member by email at **matt.wagner@ucfunds.org**.