

Investment Partner & Services Provider

Benefit your church with institutional-class solutions and care.

Partnering to Provide Mission-Aligned & High Quality Investment Solutions

Partnering with with **SouthCol Advisors** and **Investnet | PMC™** the Foundation provides high quality portfolio management aligned with the church's investment ethics and the proven long-term strategy of passively managing portfolio allocations to industry-standard indexes and benchmarks.



Founded in 1999 and headquartered in Chicago, Investnet is a publicly traded company on the New York Stock Exchange and serves **more than 105,000** financial advisors who oversee **nearly 14 million** investor accounts with **nearly \$5 trillion** on Investnet's platform. SouthCol and Investnet provide the following key services for the Foundation and our clients:

- Stewardship: Investment Consulting and Portfolio Solutions
- Governance: Fiduciary Services to Support Investment Committees
- Operations: Administration and Back-Office Solutions
- Accountability: Performance Reporting and Oversight

Investnet | PMC's suite of **Impact Portfolios** is built on a history in impact investing, quantitative expertise, and partnerships with industry leaders, such as **Sustainalytics**, an independent ESG and corporate governance research, ratings, and analysis firm. Sustainalytics provides the stock-level research data for the stock portfolios. The resultant **Quantitative Impact Portfolios** ...

- take a largely sector-neutral approach ...
- must have a minimum Morningstar Sustainability Rating of 51 ...
- a minimum carbon score that is 20% better than that of the index.



For more information, contact the Foundation:
312-334-0703 • UMFNIC.org • UMFGift.org

