

# Sustainable and Socially Responsible

Align your church's investments with ethical standards.

---

## *Exemplifying the Church's Investment Ethics*

**“United Methodist institutions shall endeavor to avoid investments in companies engaged in core business activities that are not aligned with the Social Principles.” - Book of Discipline ¶717**

The investment ethics of the church are patterned after the “Three Simple Rules” of John Wesley. First, **“do no harm.”** This rule compels us to not investment in companies with core business activities in:

- Alcoholic beverages
- Tobacco products
- Adult entertainment
- Weapons
- Gambling
- Private prisons

The Foundation follows this “clean hands” approach by not investing in such companies, which is often called **“Socially Responsible Investing”** (SRI).

**United Methodist institutions shall also “make a conscious effort to invest ... consistent with the goals outlined in the Social Principles.”**  
- Book of Discipline ¶717

Wesley's second rule to **“do good”** is captured in this directive to invest in companies surpassing the average practices and policies of their peers within the categories of **“Environmental, Social, and Governance”** (ESG).

By combining both the methods of SRI (Rule #1), screening out the companies to be avoided, and by focusing on companies outperforming peers in their ESG practices (Rule #2), the Foundation offers clients the highest quality strategies in **sustainable and ethical investing**.



For more information, contact the Foundation:  
312-334-0703 • [UMFNIC.org](http://UMFNIC.org) • [UMFGift.org](http://UMFGift.org)

