

Investing with the Methodist Foundation of Mississippi

The Foundation is your partner in ministry. We are here to help you equip, educate, and invest.

The Foundation's Investment Committee oversees the management of the investment portfolio and works in conjunction with an independent investment consultant to monitor and evaluate the asset allocation, investment strategies, and investment managers.

The Investment Policy Statement ensures the Foundation will employ a broadly diversified, conservative allocation.

The Foundation believes diversification among asset classes, investment strategies, and investment managers mitigate risk.

Because the Foundation manages over \$100 million portfolio, the Foundation can access investment strategies and investment managers that would be difficult to access by the Foundation 's constituents.

The Foundation is separately incorporated and receives no funding from the Annual Conference. Additionally, the Foundation holds all accounts in strictest confidence.

SHORT TERM FUND

Liquid
Flexible
Fixed return
No minimum investment
Earnings compounded semi-annually
Earnings are prorated for partial periods
Compares to short-term CD or money market
Protected by unrestricted net assets of The Foundation

LONG TERM FUND

Provides long-term growth of capital
Distributions of income and realized gains
Limited principal withdrawal
Return based on actual performance of investments
Broad diversification and long-term investment approach
Potential higher returns due to inherent risk of investments
Possibility of capital loss
Compares to a traditional endowed account



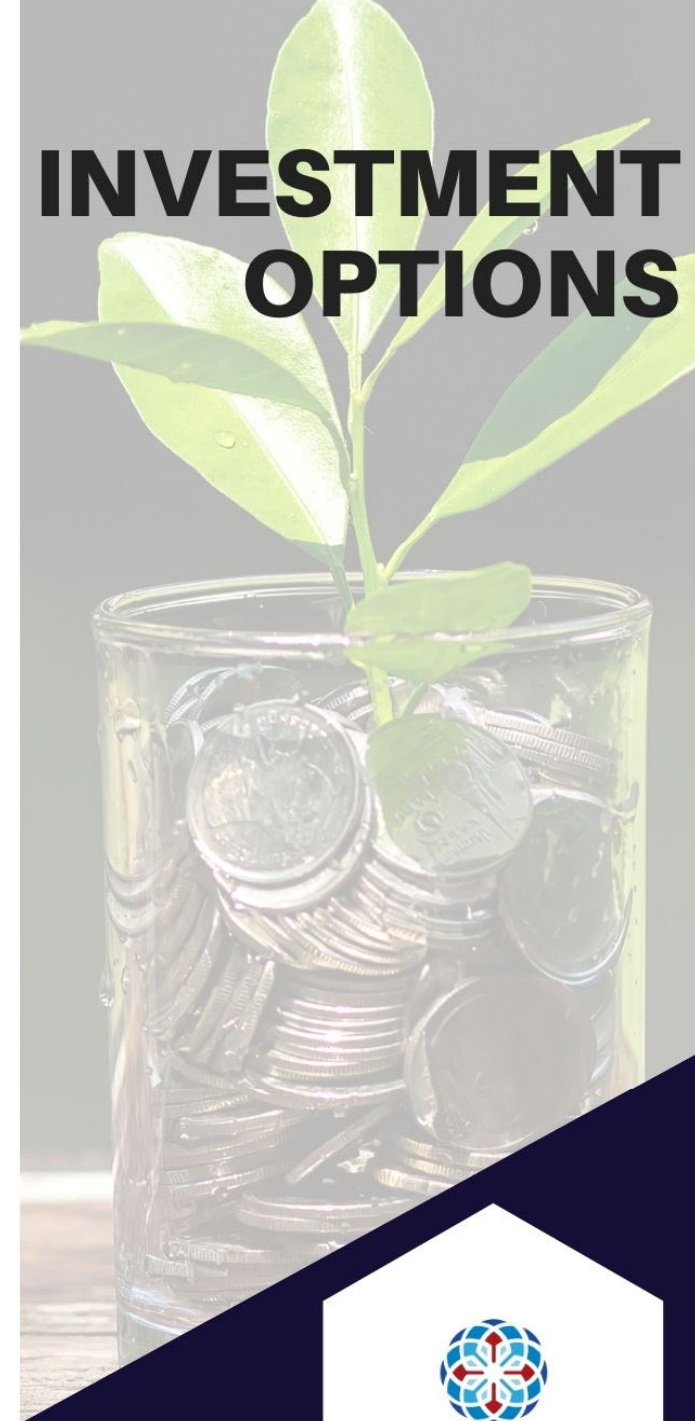
Investing Resources in Ministry

The Methodist Foundation for Mississippi has been serving the needs of Wesleyan congregations and related agencies for over 50 years. We are committed to growing and expanding our involvement in the Church's outreach and global witness.

Our purpose is to be your partner in creating a culture of generosity allowing the Church to fulfill its mission while discovering the transformational power of giving.

The Foundation serves the local Church, institutions, special projects and special ministries.

INVESTMENT OPTIONS



METHODIST FOUNDATION
OF MISSISSIPPI

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