

FUNDS AVAILABLE

EQUITY FUND

- ◇ Equity portfolio with exposure to domestic and international markets
- ◇ For investors seeking growth of their portfolio over a long-term investment horizon
- ◇ Time horizon: Long-term focus (5 years or longer)
- ◇ Higher risk than Fixed Income Fund

FIXED INCOME FUND

- ◇ Fixed income portfolio
- ◇ For investors with a focus on current income and total return
- ◇ Time horizon: Long-term focus (5 years or longer)
- ◇ Higher risk than Cash Equivalent

CASH EQUIVALENT

- ◇ Money market mutual fund
- ◇ Time horizon: Short-term focus (several months to 2 years)
- ◇ Lowest risk of the three investment funds



PROGRAM ADVANTAGES

- ◇ Socially-responsible investing
- ◇ Access to services and nationally recognized investment managers who rank among the best in the industry and typically work exclusively with large institutional investors
- ◇ Pooling of funds provides broad diversification for all account sizes.
- ◇ Multiple investment options
- ◇ Participants select their own Equity/Fixed Income allocation.
- ◇ \$1,000 minimum investment
- ◇ Ability to maintain multiple accounts
- ◇ Quarterly reporting for each account
- ◇ Easy access to funds
- ◇ On-line access to account information
- ◇ Competitive fund management and administration fees with no sales charges, front or back-end loads, surrender charges, or penalties for early withdrawal
- ◇ Value-added stewardship development services including no-cost seminars dedicated to over twelve different stewardship topics

www.umstewardship.org

FOR MORE INFORMATION OR TO SCHEDULE AN APPOINTMENT,
CALL, E-MAIL OR RETURN THIS FORM.

- ___ We'd like to learn more about The Foundation's Investment Services. Please contact us.
- ___ Please send a packet of investment information for our review.
- ___ We are interested in receiving more information about:
 - ___ Creating an Endowment Fund
 - ___ Charitable Gift Annuities
 - ___ Remembering the Church or other ministry in our Estate Plan

NAME _____ TITLE _____
CHURCH OR MINISTRY _____
ADDRESS _____
PHONE _____ E-MAIL _____



**The United Methodist
Stewardship Foundation
of Central Pennsylvania**

Our Mission

*Serving God and the Church
by promoting Christian Stewardship
in the effective management of all gifts
to the glory of Jesus Christ.*

Affiliations

American Council on Gift Annuities

Association of
Fund Raising Professionals

National Association of
United Methodist Foundations

**SERVICES PROVIDED
TO CHURCHES
AND AGENCIES**

- ◇ Stewardship Education on three levels
- ◇ Annual Commitment Programs
- ◇ Charitable Gift Annuities
- ◇ Christian Financial Living Seminars
- ◇ Endowment Agreements
- ◇ Endowment Funds
and Endowment Seminars
- ◇ Estate Planning and Wills
- ◇ Personal
Consultations
- ◇ Planned Giving
Programs



Each member of the Central Pennsylvania
(Susquehanna) Annual Conference is a
member of The Stewardship Foundation.

Serving Wilkes-Barre and Scranton Areas

*It is the pleasure of our Board of Directors
and staff to serve on your behalf.*

10-09

**INVESTMENT
MANAGEMENT
SERVICES**

For Churches and Other
United Methodist Ministries

**THE UNITED
METHODIST
STEWARDSHIP
FOUNDATION
OF CENTRAL
PENNSYLVANIA**

303 Mulberry Drive, Suite 300
Mechanicsburg PA 17050-3141
717-766-7343 or 800-272-0113

717-766-1673 fax

sfcpa@cpumc.org

www.umstewardship.org

Rev. Phyllis M. Bowers
Executive Director
877-619-5974 (toll-free)
pbowers@cpumc.org