United Methodist Foundation of the Northeast

Investing with the Foundation

WHO WE ARE

The Foundation works with over 500 churches and agencies and the New England, New York, and Upper New York Annual Conferences to grow investments and maximize income for church ministries.

2025 Portfolio Returns (net of fees)	
Stock (100%)	**19.85%**
Weighted Growth & Income (70%/30%)	**15.73%**
Balanced Growth (60%/40%)	**14.35%**
Weighted Income & Growth (30%/70%)	**10.23%**
Fixed Income (100%)	**6.10%**
Money Market	**3.00%**

What Sets Us Apart

Churches that invest with the Foundation can trust that their funds are managed in strict alignment with United Methodist Social Principles. We combine a rigorous commitment to competitive returns with socially responsible investing (SRI) and environmental, social, and governance (ESG) best practices.

POSITIVE IMPACT

Our strategy actively advances United Methodist values by prioritizing companies that promote:

- **Human Rights & Justice:** Supporting racial and gender equality while preventing forced labor, sweatshops, and human suffering.
- **Environmental Stewardship:** Preserving the natural world and actively mitigating the effects of climate change.

SCREENING & EXCLUSIONS

To maintain ethical alignment, the Foundation strictly avoids investing in businesses involved in:

- **Fossil Fuels:** Locating, extracting, or refining fossil fuels.
- **Weapons & Defense:** Producing antipersonnel weapons and armaments.
- **Vice Industries**: Manufacturing alcohol or tobacco, as well as involvement in gambling or exploitative adult entertainment.
- **Private Detention:** Operating private correctional facilities.

ACTIVE STEWARDSHIP & REINVESTMENT

We go beyond passive screening to maximize your impact across New England, New York, and Upper New York:

- **Shareholder Advocacy:** We actively vote proxies through our money managers to hold corporations accountable.
- **Mission Reinvestment:** Investment fee proceeds return directly to church mission and ministry—funding grants, loans, and vital Foundation ministries.

Questions? Contact Pam DiMartino: **pamd@umfne.org**

Learn more at umfne.org · Contact us at info@umfne.org or call (800) 595-4347