

# WELS Investment Funds—

providing cost-effective, professionally managed investment portfolios to help organizations achieve their ministry goals

## Does your congregation or school have funds that you are considering investing?

Since 1997, WELS Investment Funds has been providing investment portfolios to benefit WELS and affiliated ministries.

### The benefits

- **Ease of use.** Our staff can guide you through opening and maintaining an investment account.
- **Strength in numbers.** As more organizations invest in WELS Investment Funds, the cost savings benefits increase.
- **Proven history.** WELS Investment Funds currently manages more than \$300 million for more than 250 congregations and WELS-affiliated ministries.

## Contact us to explore your options

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Connect with us to see how we can help you achieve your ministry goals. Visit [wels.net/welsfunds](https://wels.net/welsfunds).

## The funds

There are four funds available, based on your organization's needs and ministry goals.

Most organizations with endowment and scholarship funds invest in the **WELS Balanced Fund** and **WELS Endowment Fund**.

### WELS Balanced Fund

- Seeks long-term capital growth & low to moderate level of income
- 60% equity/40% fixed income
- Mid- to long-range investment time horizon

### WELS Endowment Fund

- Seeks long-term capital growth with some current income
- Designed primarily for endowment funds
- 75% equity/25% fixed income
- Long-range investment time horizon

## An example

St. Mark's Lutheran Church receives an inheritance of \$100,000. They use the funds to set up an Outreach Endowment Fund to support their outreach to their community. St. Mark's invests the \$100,000 in the WELS Balanced Fund, and they draw 4% from their fund each year to pay for outreach events. The funds they request are deposited into their congregation's checking account when needed.