



# WELS Investment Funds

Wisconsin Evangelical Lutheran Synod

## Strengthening ministry through endowments



Congregations, schools, and ministries want to plan wisely for the future. Yet as budgets fluctuate and ministry needs grow, leaders often ask: ***How can we provide steady, dependable support for ministry for generations?***

An **endowment**—a permanent fund where gifts are invested and a portion of the earnings is distributed each year—allows the gifts of God’s people to continue blessing ministry, year after year, long after the original gift is given.

### How endowments support your ministry

Endowment distributions can strengthen ministry by supporting:

- Scholarships and tuition assistance
- Outreach and mission work
- Maintaining and improving facilities
- Long-term financial stability for congregations and schools

### Professional investment oversight

Endowment assets are professionally managed through WELS Investment Funds, which brings more than 25 years of experience, serves more than 260 WELS ministries, and manages more than \$350 million in assets.

WELS Investment Funds exists exclusively for WELS ministries and offers:

- **National board oversight** by WELS members with deep financial and ministry experience
- **Institutional investment consultants** guiding strategy and risk management
- A disciplined, **long-term investment philosophy** designed specifically for endowment funds
- **Lower costs** through pooled resources—below what most congregations could access on their own

### When donors want to contribute to an endowment

- Cash gifts are given directly to the congregation’s endowment fund
- Non-cash gifts—such as stock, mutual funds, real estate, or other appreciated assets—can be processed by WELS Foundation, which specializes in handling these charitable gifts and directs them to the congregation’s endowment at WELS Investment Funds

### A complete endowment solution

Together, WELS Investment Funds and WELS Foundation support ministries—making it simple to establish an endowment, receive gifts, and build long-term support for gospel ministry. An endowment strengthens ministry today—and for generations to come.

Executive Director Jim Holm, CFP®  
jim.holm@wels.net | 414-256-3206

Investor Services Specialist Kathleen Everson  
kathleen.everson@wels.net | 414-256-3207

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

