



United Methodist Foundation Reports Outstanding Returns for 2009

The United Methodist Foundation recently received its investment performance for calendar year 2009 from its investment consultant, Hammond Associates. Investors with the Foundation were rewarded with outstanding performance for 2009 as shown in the chart below:

UM Foundation Funds Return Summary 2009*	
Conservative Fund (35% equities and growth assets, 65% fixed income)	17.8%
<i>35/65 S&P 500/BC Aggregate</i>	<i>13.2%</i>
Moderate Fund (60% equities and growth assets, 40% fixed income)	24.0%
<i>60/40 S&P 500/BC Aggregate</i>	<i>18.4%</i>
Aggressive Fund (85% equities and growth assets, 15% fixed income)	28.7%
<i>85/15 S&P 500/BC Aggregate</i>	<i>23.5%</i>

*- These returns are net of all fees.

Of course, any church needs to consider performance as it makes decisions about where to place funds it has for long term investment such as endowment funds or proceeds from the sale of property. In that regard the Foundation's funds did very well in 2009.

There are other important reasons to invest with the Foundation as well. Here are some of the reasons you might consider:

1. The Foundation uses a highly regarded professional investment consultant. We receive the same **expert guidance available to university endowments and community foundations with hundreds of millions of dollars to invest.**
2. **Investment options** are available to meet a variety of investment goals.
3. Investment with the Foundation takes the burden off local church members and prevents possible conflicts of interest.
4. The three long term investment accounts are **broadly diversified with asset classes often available only to those with very large amounts to invest.**
5. **Socially responsible** investment practices are employed.
6. There is a competitive and transparent fee schedule.

7. Investors receive regular reports on the performance of funds invested.
8. Accounts are **easy to set up**, changes can be made monthly, and withdrawal of funds when needed is convenient.
9. Investors have access to periodic market review and forecasts through Hammond Associates.

For further information on opportunities available through the United Methodist Foundation call the office at 312-346-9766, extension 104 or visit the website at www.nicumf.org. A representative from the Foundation will be glad to come to your church to provide further information.

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