



Our Partnership with Wespath Investment Management

“Wespath” Reflects Our Heritage and Vision:

Wes honors John Wesley and our Wesleyan theological roots.

Path refers to our proven, long-term investing philosophy—the path to financial growth.

- **Non-profit:** Wespath is the investment management division of the General Board of Pension and Health Benefits which is a not-for-profit agency of The United Methodist Church.
- **Longevity:** Wespath brings more than 100 years of investment experience—tracing its roots back to 1908.
- **Scale:** Wespath is recognized as the largest reporting faith-based investor in the United States—managing approximately \$21 billion in assets.
- **Diversification:** Wespath offers a family of globally diversified multi-manager funds with exposure to more than 40 carefully selected investment managers.
- **Aligned with Values:** Wespath employs an investment approach guided by the Social Principles of The United Methodist Church. They also invest in affordable housing and community development projects through their Positive Social Purpose Lending Program.
- **Sustainable Investment:** The Wespath investment approach incorporates environmental, social and governance (ESG) factors.
- **Expertise:** The Wespath investment team comprises 21 full-time investment professionals.
- **Cost-Effective:** Economies of scale reduce operational and administrative expenses.

Data as of June 30, 2015