

Dear Church Investors,

In recent weeks, we have witnessed volatility in global financial markets, driven largely by geopolitical tensions, U.S. policy shifts, and short-term economic data. With unsettling news impacting both domestic and international markets, some church leaders understandably might feel anxious about the church's investments and financial strategies. Especially at moments like these, staying composed and avoiding impulsive decisions is critical.

At the United Methodist Foundation of Michigan, we have been dedicated to serving congregations, pastors, church leaders, and individuals across our state for a century. Our mission has always been to come alongside your ministry, helping you align your financial resources with your purpose and vision. Here is a summary of strategies to consider amid the ups and downs of the financial markets:

Staying Steady in Uncertain Times

During periods of market instability, it is crucial to remain calm and make informed decisions. Panic selling is a common reaction, but history shows that maintaining a long-term perspective and staying grounded in the core financial strategy often leads to better outcomes. Our investment team adheres to this steadiness with a keen eye on the real time activity of the markets.

We understand that concerns about a market correction can create uncertainty, but it's important to maintain a long-term perspective. History has shown that markets go through cycles. While short-term volatility is inevitable, sustained growth is typically realized over time. Our experienced fund managers are actively monitoring the market and adjusting strategies to minimize the impact of downturns and economic headwinds. By focusing on long-term value and proactively managing assets, we aim to position your investments for resilience, even in challenging times. We remain committed to navigating these uncertain periods with diligence and strategic foresight.

Our Foundation offers a range of faith-driven, responsible investment funds designed to provide peace of mind while supporting your financial goals. We are committed to ensuring your investments reflect our shared values, with options to choose asset allocation mixes that suit an appropriate level of risk tolerance. For most, ensuring a balanced asset allocation and a focus on total return of the investment portfolio is key.

Opportunities Amidst Volatility

While market fluctuations can be unsettling, they also present unique opportunities. For instance, a market downturn can make it an ideal time to invest in assets at lower prices. Our experienced team guides the investment choices strategically through these opportunities. The goal is to ensure investments are purposefully positioned to benefit from long-term growth.

Additionally, the current economic climate highlights the importance of diversified fund development strategies. We provide a broad continuum of financial stewardship services, including stewardship consultation, planned giving seminars, grants, awards, and scholarships. These services are designed to support and enhance your ministry's financial health, regardless of market conditions.

Our Commitment to Value-Aligned, Responsible Investing

One of our core values is to offer investment options that align with the ethical and social principles important to our community. Our investment options are tailored to support companies and activities consistent with our shared beliefs. This alignment ensures that your investments not only contribute to the church's financial goals but also reflect our historic values and mission.

Looking Ahead

As we navigate these challenging times, remember that the United Methodist Foundation of Michigan is here to support you every step of the way. Our dedicated team is ready to assist you with customized advice and resources to help you make the most of your church's financial stewardship ministry.

We invite you to learn more about our investment options and services by reaching out to us directly. Let us help you turn challenges into opportunities and ensure that your financial resources are working effectively for your ministry and mission.

Your unwavering trust and partnership are truly heartwarming to us. We will continue to do everything within our ability to meet challenging moments proactively and efficiently for the sake of our collective commitment to making disciples of Jesus Christ for the transformation of the world.

Blessings,

David S. Bell
President and Executive Director