

Message from the Executive Director

We are working to serve YOU!

- The Foundation is proud to offer appropriate investment portfolios to churches of all sizes at a reasonable cost.
- We continue to expand our training resources.
- We love getting to know churches, individuals, and their common challenges.
- We have increased our budget to provide annual ministry grants for vital church programs
- Our management fees are reinvested into providing more services to churches in the New York and Upper New York Conferences.

In a recent conversation with a Board member, we talked about what it means for churches to invest with the United Methodist Frontier Foundation. We discussed the history of our fund offerings and the role of the Foundation in selecting investment managers.

The following are highlights from conversations with our investment managers:

Providing investment management for United Methodist church funds since 2002

The funds we offer have a demonstrated 20+ year history of being suitable for church investments. What makes a fund suitable? The investment choices follow the United Methodist Social Principles and serve as a testimony to our faith. The funds are diversified with less concentration than indexes and have delivered competitive returns at a reasonable cost. Our strategy is to purchase securities based on their value for sustained long-term growth and protection in volatile periods.

Meeting the Obligation of a Fiduciary

The United Methodist Frontier Foundation Board of Directors serves as a fiduciary for the funds you entrust with us. Our semi-annual meeting with our investment advisors allows us to discuss the 5 “Ps” of good investment manager reviews.

People: We get to know the team.

Philosophy: We get to know the fundamental underpinning of value in their investment strategy.

Process: We get to know the process-oriented approach and whether it is repeatable.

Performance: We get to discuss the performance history.

Price: We examine our ability to provide a reliable, stable product at a reasonable price.

Faithfully yours,



Ellen Knudsen
Executive Director
United Methodist Frontier Foundation