

# Wespath's Social Values Choice Suite of Funds



*For investors with a heightened focus on corporate environmental and social performance*

## Overview

The Social Values Choice Suite of Funds was specifically designed in response to resolutions approved by United Methodist Annual Conferences regarding:

- companies that derive a significant amount of revenue from the production of fossil fuels; and
- companies named in petitions related to peace in the Middle East.

The Suite of Funds includes an equity fund and two fixed income funds, which complement each other to provide investors with asset class diversification and inflation protection.



	Social Values Choice Equity Fund*	Social Values Choice Bond Fund	U.S. Treasury Inflation Protection Fund
Investment Approach	Exclude companies with fossil fuel reserves used for energy purposes, and specific companies named in annual conference resolutions concerning Israel and the Palestinian Territories		Invests primarily in U.S. Treasury Inflation Protected Securities (TIPS)
Investment Strategy	Passively-managed global equity fund	Actively-managed global fixed income fund	Passively-managed fixed income fund
Benchmark	MSCI World Environmental, Social and Governance (ESG) ex Fossil Fuels Index	Bloomberg Barclays U.S. Universal (ex mortgage-backed securities) Index	Bloomberg Barclays U.S. Inflation Linked Bond Index

*\*Formerly the Equity Social Values Plus Fund*

## About Wespath:

Wespath Benefits and Investments (Wespath) is a not-for-profit agency that has been serving The United Methodist Church for over a century. In accordance with its fiduciary duties, Wespath administers benefit plans and invests over \$23 billion in assets for over 100,000 participants and over 100 United Methodist-affiliated institutions (as of December 31, 2017). Wespath maintains the largest reporting faith-based pension fund in the world, which is among the top 100 pension funds in the United States. Its fund management activities are carried out by Wespath Investment Management, the agency's Investments Division.

# How to Invest If You Are...

## An Individual Participant

Log in to Benefits Access  
[benefitsaccess.org](https://benefitsaccess.org)

Click  
"Take Action"

Under **Manage Investments**,  
choose:

"Change investment of current balance"  
if you want to reallocate  
your current account balance

AND/  
OR

"Change investment of future contributions"  
if you want to change only the investment of  
new contributions made to your account

The Social Values Choice Suite of Funds is available to participants who self-direct their investments in Wespath's defined contribution plans. We recommend that you consult a professional financial planner before you invest. Eligible participants<sup>1</sup> in Wespath-administered retirement plans can receive financial planning assistance at no additional cost<sup>2</sup> from EY Financial Planning Services, a leading global financial services firm.

**Questions?** Contact a member of Wespath's Customer Service team at **1-800-851-2201**, or EY at **1-800-360-2539**.

## A United Methodist-Affiliated Institutional Investor

Log in to the Wespath Portal  
[portal.wespath.org](https://portal.wespath.org)

Choose the tile for the  
**Institutional Investor Portal**

Then select **"Deposit"**

To invest new assets select:

OR

"Initiate a Deposit"

Then choose  
**"Allocate Deposit  
According to a  
One-Time Allocation"**  
to invest a one-time  
deposit

**"Change Your Target  
Allocation For New  
Money Coming In"**  
Future deposits will be  
processed according to  
the new allocation

To transfer existing assets select:

OR

**"Transfer Between  
Investment Funds"**  
to transfer a specific  
amount into the Suite  
of Funds

**"Rebalance Account"**  
to reallocate the entire  
account portfolio among  
the Suite of Funds

**Questions?** Contact a member of Wespath's Institutional Investment Services team at **1-847-866-4100**.

*This is not an offer to purchase securities. Offers will only be made through the Investment Funds Description (IFD) available at [wespath.org/ifd](https://wespath.org/ifd). We recommend that you thoroughly read the descriptions in the IFD and the Fund Summary Prospectuses (available at [wespath.org/investments/resources/publications-news/](https://wespath.org/investments/resources/publications-news/)) before making investment decisions regarding the funds.*

<sup>1</sup> EY Financial Planning Services are available to active participants and surviving spouses with account balances, and to retired and terminated participants with account balances of at least \$10,000.

<sup>2</sup> Costs for this service are included in Wespath's operating expenses that are paid for by the funds.