

Sustainable and Socially Responsible

Align your church's investments with ethical standards.

Exemplifying the Church's Investment Ethics

“United Methodist institutions shall endeavor to avoid investments in companies engaged in core business activities that are not aligned with the Social Principles.” - Book of Discipline ¶717

The investment ethics of the church are patterned after the “Three Simple Rules” of John Wesley. First, **“do no harm.”** This rule compels us to not investment in companies with core business activities in:

- Alcoholic beverages
- Tobacco products
- Adult entertainment
- Weapons
- Gambling
- Private prisons

The Foundation follows this “clean hands” approach by not investing in such companies, which is often called **“Socially Responsible Investing”** (SRI).

United Methodist institutions shall also “make a conscious effort to invest ... consistent with the goals outlined in the Social Principles.”
- *Book of Discipline ¶717*

Wesley's second rule to **“do good”** is captured in this directive to invest in companies surpassing the average practices and policies of their peers within the categories of **“Environmental, Social, and Governance”** (ESG).

By combining both the methods of SRI—Rule #1, screening out the companies to be avoided—and by focusing on companies outperforming peers in their ESG practices—Rule #2, the Foundation offers investment options to clients seeking the highest quality strategies in **ethical investing**.



For more information, contact the Foundation:
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