

St. John United Church of Christ  
Bellevue, Kentucky

**INVESTMENT POLICY**

- I. Mission: The church's invested funds have as their sole intent the furtherance of the missions and ministries of the church.
- II. Rationale: This policy seeks to specifically prohibit very few investments. In the interest of both safety and return, diversification is to be sought, including mutual funds of all types as well as individual stocks, bonds, and other debt instruments.
- III. Preservation of capital: the policy recommends a balance of 60% favoring security and preservation of capital and 40% more open investing oriented toward a "total return" investment style. (That is, looking toward both direct dividend/interest return and capital appreciation as both giving return on invested capital.)
- IV. Social responsibility: We commit to a policy of non-investment in weapons production and industries known as consistent violators of environmental and labor regulation. On the other hand, we hope to seek out companies investing in renewable energy and who have been recognized for their progressive personnel policies and public philanthropy.
- V. The Chair of the Finance Committee and/or the Treasurer will be responsible for implementing this policy and serve as liaison to financial entities.

Approved by Strategic Leadership Council, 1/22/2015