

# 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 Social Values Choice 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 U.S. Universal (ex mortgage-backed securities) Index	Bloomberg U.S. Inflation Linked Bond Index

*\*Formerly the Equity Social Values Plus Fund*

## About Wespath:

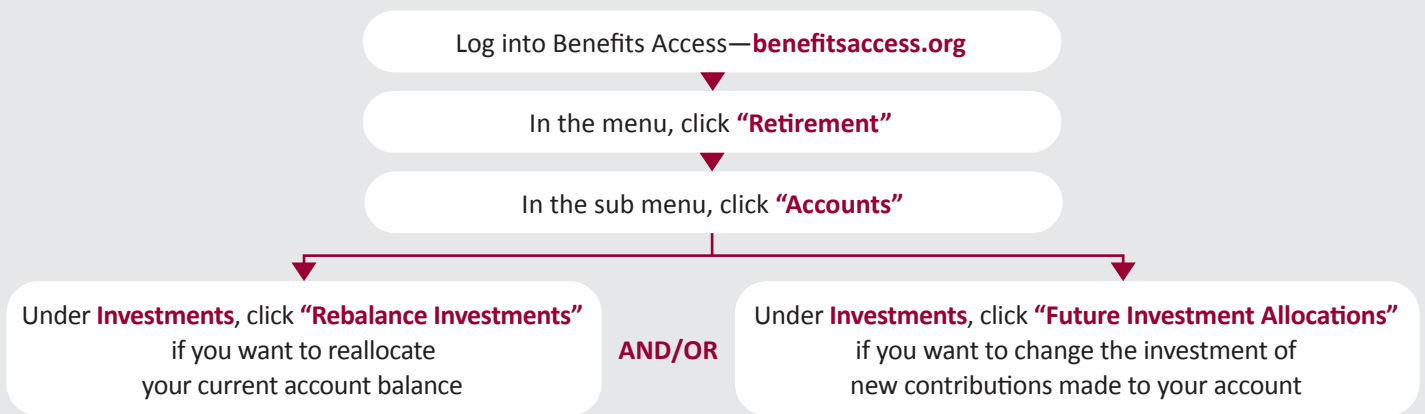
Wespath Benefits and Investments (WBI) is a not-for-profit agency that has been serving The United Methodist Church (UMC) for over a century. In accordance with its fiduciary duties, WBI administers benefit plans and, together with its subsidiaries, including Wespath Institutional Investments, invests over \$25 billion in assets on behalf of over 100,000 participants and over 150 United Methodist-related institutions (as of December 31, 2023). WBI seeks to invest in a sustainable manner that seeks to achieve positive financial, social and environmental impact while upholding the values of the UMC. WBI maintains one of the largest reporting faith-based pension funds in the world. For additional information about Wespath Benefits and Investments, please follow us on [Instagram](#), [Twitter](#), [Facebook](#) and [LinkedIn](#).

*This does not constitute an offer to sell any investments and only provides summary information. More detailed information can be found in the Investment Funds Description and related documents, which are available at [wespath.org/retirement-investments/publications-and-reports](https://wespath.org/retirement-investments/publications-and-reports).*

# How to Invest

Wespath will introduce an option for participants with defined contribution balances to invest in the Social Values Choice Suite of Funds through LifeStage Investment Management by early 2026. LifeStage Investment Management creates a participant's investment portfolio—and automatically adjusts it over time—based on personal factors like age and risk tolerance. The Social Values Choice Suite of Funds is currently only available to participants who self-manage their investments in Wespath's defined contribution plans. If you use the automated LifeStage Investment Management tool and would like to invest in Wespath's Social Values Choice Suite of Funds, you will need to switch to self managing your investments. 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.

**Participants that self-manage their investments may select funds from the Social Values Choice Suite of Funds by following the below steps in Benefits Access:**



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

If you use LifeStage Investment Management and would like to switch to self-managing your investments so you can invest in the Social Values Choice Suite of Funds, log into Benefits Access ([benefitsaccess.org](https://benefitsaccess.org)). In the menu, click **"Retirement."** Under Investments, click **"Manage Investment Options."** Click **"See details and investment allocations."** Click **"Change LifeStage Personal Investment Profile."**

If you are a United Methodist-related Institutional Investor that would like to learn more about Wespath's Social Values Choice Suite of Funds, contact a member of Wespath's Institutional Investment Services team at **1-847-866-4100** or [investmentinfo@wespath.org](mailto:investmentinfo@wespath.org).

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<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.