

Investing With ELFEC

ELFEC has a threefold mission: to help congregations manage and grow investments, to help individuals leave gifts to the church, and to grant money to Lutheran charities and other faith-based projects.

- *Managing investments since 2008*
- *Responsible Investment policies*
- *Focus on preserving capital, generating income and growing funds*
- *30 congregations and church institutions now investing with us*
- *Investments managed by Montrusco Bolton Investments Inc.*
- *Over \$29 million in assets under management*

ELFEC

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What is Responsible Investing?

For ELFEC, Responsible Investing (RI) is a way of operating that upholds the integrity of God's creation and helps to build a just and sustainable society. It respects the values and beliefs of our faith-based partners while achieving our practical financial goals. RI is also a tool to spread messages such as respect for the planet, corporate integrity and social justice.

Responsible Investing integrates environmental, social and governance considerations into the investment management process and ownership practices.

We incorporate 5 fundamental RI issues into our investment strategy: Human Rights and Dignity, Labour Rights; Economic and Social Justice; Environmental Sustainability; and a Global Culture of Peace.

We execute our RI strategy by:

- *Making sure that potential investments are screened during the selection process.*



- *Authorizing our asset manager to participate in the governance of companies we invest in by voting proxies.*
- *Engaging with companies through SHARE's corporate engagement programs.*
- *Investing directly in organizations that produce social or environmental benefits as well as financial returns.*

