



ELFEC

responsible investing • gift planning

Managed Partner Funds

ELFEC offers congregations and faith-based charitable organizations the opportunity to pool their investments with ours. Our partners benefit from professional investment management in accordance with an Investment Policy that emphasizes preservation of capital, generation of reasonably predictable stream of income, capital growth while ensuring Responsible Investing policies are followed. We offer two managed partner fund options for our partners.

	Managed Partner Fund	Small-Cap Managed Partner Fund
Capital Required	\$50,000+	\$25,000 - \$50,000
Capital Ownership retained by Congregation	✓	✓
Eligible for Partner Grants	✓	✓
Responsible Investment Principles followed	✓	✓
Social Good Investment	✓	✓
Investment Portfolio Options	Income & Security and/or Growth	Only one: Income & Security
Income Payments	Annually	Annually
Additional Deposits	Any time	Any Time
Withdrawal Partial Principal	✓ (Fees may apply)	No
Agreement Cancellation	90 day notice	90 day notice
ELFEC Admin Fee	Reduces as amount invested increases	1% per year