



Diocese of Atlanta
Diocesan Investment Fund Information

May 30, 2023

To parishes of the Diocese interested in the Diocesan Investment Fund:

The Long-Term Investment Committee of the Diocese of Atlanta oversees this collective investment program, known as the Diocesan Investment Fund, setting the investment policy, choosing advisors, and meeting quarterly to review results. The Long-Term Investment Committee includes the Chair of the Finance Committee, the Diocesan Treasurer, the Canon to the Ordinary and the Canon for Administration and Finance of the Diocese as well as lay members with investment experience. We have been pleased to offer this service for many years.

The investment managers selected by the Long-Term Investment Committee and with approval from the Diocesan Finance Committee are The Episcopal Church Foundation and State Street Global Advisors.

Episcopal Church Foundation is an independent nonprofit organization founded in 1949 by then-Presiding Bishop Henry Knox Sherrill to support Episcopal organizations around the country. Today, its mission is to strengthen the financial and leadership capabilities of Episcopal churches, dioceses, schools, and related organizations. It brings a deep understanding of the Episcopal Church as well as significant support for endowment creation and growth. SSGA is one of the world's largest asset managers and brings extensive experience managing the endowment and investment funds of charitable organizations.

Episcopal Church Foundation's Endowment Management program serves 330 clients with over \$500 million in assets under management. SSGA has been its investment manager for 25 years. Together, they offer a clear advantage in addressing the Long-Term Investment Committee's concerns.

Available for your review is the Investment Policy Statement as well as a Participant Guide.

Please submit the following documents (available in the Participant Guide) to invest in the Diocesan Investment Fund:

- Participation Resolution
- Participation Agreement
- New Account Form
- Addition to Account Form
- Withdrawal from Account Form

Should you have any questions, please contact me or Barbara Schroeder, Canon for Administration and Finance, at bschroeder@episcopalatlanta.org.

We would like to welcome you to the Diocesan Investment Fund.

Faithfully,

Mike Nadal
Chair, Long-Term Investment Committee of the Diocese of Atlanta
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