

WELS Investment Funds—

providing cost-effective, professionally managed investment portfolios to help organizations achieve their ministry goals

Since 1997, WELS Investment Funds has been providing investment portfolios to benefit WELS and affiliated ministries.

We know that we are better together, which is why **255 WELS organizations have invested nearly \$300 million** with WELS Investment Funds (as of 06/30/23). By pooling our resources, we can enjoy benefits we wouldn't have by investing individually.

Our investors benefit from:

- lower investment costs
- oversight by a national board of directors made up of WELS members with relevant experience
- the expertise of Vanguard, our investment consultant
- ease of use as investors work directly with our professional WELS staff to set up and manage accounts

Does your congregation or school have funds that you are considering investing? Please contact us to explore your options.

Contact us

Executive Director Jim Holm, CFP®, at jim.holm@wels.net or 414-256-3206



Connect with us to see how we can help you achieve your ministry goals. Visit wels.net/welsfunds.

What investors are saying



When Grace, Yorba Linda, Calif., received a generous gift from one of its members, Grace's leadership wanted to explore different options for investing that gift. Their

goal was to find something that benefited their mission and honored the wishes of the donor. **"As a member of WELS, it only made sense to check out WELS Investment Funds,"** says Pastor Phillip Sievert.

Sievert and Grace's church council met via video with Executive Director Jim Holm to discuss their investment options. Sievert was grateful for the meeting and the direction it provided: **"It gave our council confidence in WELS Investment Funds and a sense of relief knowing that we can leave the gift in good hands without having to worry about constant decision-making,"** he says. **"What I was really pleased with is the mission-mindedness that came out of our discussion."**

Sievert concludes, **"WELS Investment Funds uses their time and talents and expertise in making the most of our congregation's gifts and investments. This frees us up to focus on what Jesus has called us to do, to 'go and make disciples of all nations.'"**