

Traditional Values Portfolio

Everence Asset Management



The Everence® Traditional Values Portfolio offers you an investment option that aligns with traditional biblical values. If you are looking for a way to align your personal faith convictions with your financial investment choices, this investing option may be right for you.

About this portfolio

Your investment makes a difference through the selection of values-based investing options.

Using a combination of traditional values screens and industry-leading, data-driven screening, the Traditional Values Portfolio invests in faith-rooted mutual funds that avoid industries and activities like alcohol, tobacco, gambling, abortion or pornography.

Management and monitoring

All Everence Asset Management portfolios, including the Traditional Values Portfolio, are monitored and chosen based on a range of criteria, including fund objectives, characteristics, historic performance, tenured management and ratings compared with peers.

The Traditional Values Portfolio is monitored and regularly evaluated just like all of our managed portfolios. This portfolio was created because of growing demand by investors for options that specifically reflect their values.

Our investing approach features sound, long-term strategies that provide the opportunity for growing your resources and managing risk, so your resources can help advance the kingdom of God.

Here to help

If you'd like to invest in the Traditional Values Portfolio or want to know more, please contact your local Everence financial professional or call us at 800-348-7468.



Investments are subject to market fluctuations, may lose value and are not subject to any company or government guarantee.

Consider a fund's investment objectives, risks and charges and expenses carefully before you invest. A fund's prospectus contains this and other information.

This portfolio was designed to align with specific investing and social objectives and may include funds with investment strategies that differ than those in other Everence Foundation and Everence Trust Company portfolios. Subject to account minimum balances. See an Everence financial professional.

Investments and other products are not NCUA or otherwise federally insured, may involve loss of principal and have no credit union guarantee.