

# Stewardship investing philosophy

*You try to be a good steward of your financial resources. Though you may not be Wall Street savvy, you are probably aware that many financial investment opportunities would not complement your values.*

*Everence has made a commitment to meet you where you are on your stewardship journey. The Everence stewardship investing philosophy allows your investment decisions to walk hand-in-hand with your values.*

Stewardship investing is a **philosophy** of financial decision making motivated and informed by faith convictions. It holds in tension a **responsibility** for the productive use of financial resources and a deep-seated concern for the individuals, communities, and environments that are impacted by our investment choices. We consider stewardship investing an intrinsic part of who we are as people celebrating God's generosity and actively following the example of Jesus Christ.

Stewardship investing grows out of our 500 year-old Anabaptist **faith tradition**. From this perspective, we realize:

- Our faith **values** are to inform and be exhibited in all aspects of our lives.
- We are called to work for peace, justice, compassion, and spiritual transformation.
- We are **caretakers** of creation and the communities around us and we must preserve them for future generations.
- We are called to be **financially productive** – to make good and wise use of all the resources God has entrusted to us.

These faith traditions and understandings are the foundation for our approach to modern financial involvement.

Stewardship investing is the broad framework in which Everence confronts the complex task of investing. It responds to and integrates both the social and financial concerns of our world.

- We seek out companies that support **positive values** such as the respect for human dignity, responsible management, and environmental stewardship, while avoiding industries and activities like gambling, alcohol and tobacco production, and military contracting.
- We participate actively in corporate decision making through **shareholder advocacy** and direct company dialogue – challenging harmful activities, encouraging positive social change, and supporting wise business decisions that focus on long-term benefits for all stakeholders.
- We pursue an extensive program of **community development investing** that widens the door of economic opportunity by empowering disadvantaged individuals and communities.

Stewardship investing challenges us to identify and consistently apply the values we hold dearest. It is an approach that moves beyond philanthropy or simply doing the right thing. Stewardship investing is born of a spirit of thanksgiving which embodies our **abiding concern for others**.



**Everence**®