



How Should an Individual, Association or Branch Church Invest Funds?

Question: How should I invest my funds?

Answer: From time to time, members have asked us how to invest their funds, or those of their Branch Church or Association. It is important to note that, for The Mother Church, the process of deciding how to invest is just as important as the act of investment. This process primarily consists of:

Prayer

Seeking out professional advice appropriate to the circumstances.

For this reason, we recommend that you use this same process when thinking about your own investments. We cannot give financial advice because we are not financial advisors. It is in your best interest to contact a trusted local financial professional to help with financial planning, both individual or for a Branch Church or Association.

Because of its size, The Mother Church consults with a number of institutional investment managers that specialize in managing funds for endowment, pension, foundations and other larger organizations. These managers have account sizes that begin at \$2 million and can be much higher. As a result, they are not practical advisors for many smaller organizations or individuals.

The Church's 5-person Investment Committee oversees our investments. An institutional investment consulting firm advises the Committee. This advice is tailored to The Mother Church's unique size, needs, and constraints. To appropriately meet your goals, you would want advice that is tailored to your own unique size, needs, and constraints.

Question: How does The Mother Church screen investments for medical companies?

Answer: Many Branch Churches and Associations desire to identify investments that are screened for compatibility with Christian Science. Often stocks that some members may feel are inappropriate to own represent industry sectors that are pervasive and generally profitable. As a result, many investment managers insist upon including such stocks in a portfolio.

The solution for The Mother Church involves working with institutional investment managers to identify or to establish investments that are suited best to larger organizations and often require very significant minimum funding amounts of many millions of dollars. We recognize that the issue of screening investments may present a challenge which may not have an easy solution, and calls for careful thought and prayer.



Trusts with The Mother Church: In some instances, many individuals, Branch Churches and Associations have found it helpful to set up a trust with The Mother Church. These trusts, while irrevocable, can provide annual income to support you or your Branch Church or Association. You may find more information about these trusts on our website at <http://members.christianscience.com/giving/for-branch-churches-societies-associations/>. We would be happy to speak to you about the trust option.

For more information, please contact us:

The First Church of Christ, Scientist
Office of the Treasurer
Philanthropy Team, P05-10
210 Massachusetts Avenue
Boston, MA 02115
Email: philanthropy@cspc.com
Tel: 617-450-3277