



## TYPES OF ACCOUNTS

The Holston Foundation works with non-endowed funds and endowed funds. If you are interested in establishing an endowment or an endowment committee at your church we can help.

Endowments fund the future of your ministry and allow others to leave a lasting legacy.

## TYPES OF INVESTMENTS

### Long Term Horizon

Balanced Growth Fund: For long-term investments utilizing 60% stocks and 35% fixed assets and 5% cash. Duration of investment 3+ years.

### Short Time Horizon

Short-Term Income Fund: For short-term investments that will be spent in less than 2 years.

### Customized Mix of Risk Tolerance

Intermediate Income & Equity Funds: Gives investors the flexibility of allocating a different mix than the balanced growth fund.

**7.5%** Average annualized return on investment since 1990.

## WHY THE HOLSTON FOUNDATION?

Investing in the Holston Foundation allows your church to earn funds for ministry in a way that best fits the church's needs.

The Holston Foundation follows socially responsible principles inspired by our faith. When you invest with the Foundation your investments advance ministry.

## FOUNDATION FACTS

- \$130 million in assets under management in the Holston Foundation
- No cost to open or close accounts or for transactions
- Foundation established in 1981 to serve the local church
- Investments in the Foundation are governed by our Investment Policy Statement (IPS)

## FOR INVESTMENT INQUIRIES

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