Building Biblically Responsible Portfolios

Use this worksheet for today's presentation and workshop.



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1.	Does your organization screen its investment portfolio? If so, what are you screening and why? If not, are you considering this approach?
2.	Do you use biblically responsible products in your organization's portfolio? Do you use secular products as well? Do you use a combination of both? How did you come to this decision?
3.	Does your organization have a process when hiring or terminating an investment strategy? a. Yes b. No c. Unsure
4.	Do you know if your investment managers are in-line with your organization's values? a. Yes b. No c. Unsure

5.	Are you eliminating all conflicts of interest on your board, investment, and finance committees? If so, what is your approach?	
6.	How many of you have heard of the Uniform Prudent Management of Institutional Funds Act (UPMIFA)?	
7.	What practices are you utilizing to make sure your portfolio is managed in a prudent fashion?	
The	ank you so much for joining me today! If you have any questions	





