

The Spectrum of Values Alignment

Use this worksheet for today's presentation and workshop.



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1. Where does your organization fit within the spectrum of values alignment?
2. How many of you have heard of the Uniform Prudent Management of Institutional Funds Act (UPMIFA)?
3. How many of you have a formal investment policy statement? Are there any specific mandates in the investment policy statement for how the portfolio should be managed?
4. Does your organization have a process when hiring or terminating an investment strategy?
5. 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?
6. How many in the room are familiar with proxy voting?

7. Do you know if your investment managers are in-line with your organization's values?

8. What practices are you utilizing to make sure your portfolio is managed in a prudent fashion?