



United Church Funds
Investing Together for a Sustainable World

Trustee Checklist: A Guide for Fiduciaries

Use this checklist to get the most out of the tools and resources that UCF provides to church financial leaders in fulfillment of their fiduciary and stewardship responsibilities around investment assets. Contact our team at info@ucfunds.org with any questions.

- ☐ **Visit UCF Website**
Familiarize yourself with the [UCF website](#). There you'll find up-to-date information on UCF's investment performance, responsible investing, planned giving resources and transaction forms.
- ☐ **Utilize Client Portal**
Access your UCF account(s) through the Client Portal under the [Client Access link](#) to download monthly and/or quarterly statements, or prepare a report (annually at a minimum) of your current investment holdings and share them with your fellow committee members.
- ☐ **Update Authorized Officer(s)**
Review your church or organization's current list of authorized officers. If updates are necessary, use the Change of Authorized Officers form under the News and Resources tab on the website.
- ☐ **Subscribe to Monthly Newsletter**
Ensure that key officers and committee members receive the UCF monthly newsletter for important updates. Individuals may subscribe at <https://ucfunds.org/subscribe/> and unsubscribe anytime.
- ☐ **Register for Quarterly Town Hall**
Register for UCF's quarterly Town Hall Meetings, which are held live virtually on Zoom. These sessions offer updates on organizational news, market trends, performance and responsible investing, with a Q&A opportunity. UCF sends email reminders and registration links after each quarter end.
- ☐ **Review Investment Policy Statements & Asset Allocation**
Periodically review your investment and endowment policies. Your UCF Institutional Relationships team member can provide recommendations and guidance if your church or organization does not have policies in place.
- ☐ **Schedule Portfolio Review**
If it has been more than two years since your church or organization has had a portfolio review, schedule a meeting with an Institutional Relationships team member by email at matt.wagner@ucfunds.org.

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Trustee Invocation For Church

**Episcopal Church. Diocese of
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Convention of the Protestant Episcopal Church of the Diocese of Washington Episcopal Church. Diocese of Washington. Convention, 1913

The Top Books of the Year Trustee Invocation For Church The year 2023 has witnessed a noteworthy surge in literary brilliance, with numerous captivating novels captivating the hearts of readers worldwide. Lets delve into the realm of top-selling books, exploring the fascinating narratives that have charmed audiences this year. Trustee Invocation For Church : Colleen Hoover's "It Ends with Us" This poignant tale of love, loss, and resilience has captivated readers with its raw and emotional exploration of domestic abuse. Hoover skillfully weaves a story of hope and healing, reminding us that even in the darkest of times, the human spirit can succeed. Uncover the Best : Taylor Jenkins Reids "The Seven Husbands of Evelyn Hugo" This captivating historical fiction novel unravels the life of Evelyn Hugo, a Hollywood icon who defies expectations and societal norms to pursue her dreams. Reids compelling storytelling and compelling characters transport readers to a bygone era, immersing them in a world of glamour, ambition, and self-discovery. Discover the Magic : Delia Owens "Where the Crawdads Sing" This captivating coming-of-age story follows Kya Clark, a young woman who grows up alone in the marshes of North Carolina. Owens spins a tale of resilience, survival, and the transformative power of nature, captivating readers with its evocative prose and mesmerizing setting. These popular novels represent just a fraction of the literary treasures that have emerged in 2023. Whether you seek tales of romance, adventure, or personal growth, the world of literature offers an abundance of engaging stories waiting to be discovered. The novel begins with Richard Papen, a bright but troubled young man, arriving at Hampden College. Richard is immediately drawn to the group of students who call themselves the Classics Club. The club is led by Henry Winter, a brilliant and charismatic young man. Henry is obsessed with Greek mythology and philosophy, and he quickly draws Richard into his world. The other members of the Classics Club are equally as fascinating. Bunny Corcoran is a wealthy and spoiled young man who is always looking for a good time. Charles Tavis is a quiet and reserved young man who is deeply in love with Henry. Camilla Macaulay is a beautiful and intelligent young woman who is drawn to the power and danger of the Classics Club. The students are all deeply in love with Morrow, and they are willing to do anything to please him. Morrow is a complex and mysterious figure, and he seems to be manipulating the students for his own purposes. As the students become more involved with Morrow, they begin to commit increasingly dangerous acts. The Secret History is a brilliant and suspenseful novel that will keep you wondering until the very end. The novel is a warning tale about the dangers of obsession and the power of evil.

http://www.frostbox.com/About/Resources/Documents/statspin_express_4_manual.pdf

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