

Missionally Aligned Institutional Investment Management



Blue Trust Institutional manages assets for churches, ministries, endowments, foundations, schools, and charitable trusts.

We believe investments are a means to fulfill your organization's mission and therefore align your portfolio with your faith-based convictions. Our dedicated team of professionals combines biblical wisdom and technical expertise to help institutions steward their resources wisely and increase their impact.



Partners in Fiduciary Responsibility

Blue Trust Institutional helps organizations define roles and responsibilities for their board, committee, and investment manager; draft and adopt an Investment Policy Statement; and implement an investment plan in the pursuit of their financial goals. However, we are not simply portfolio managers; rather, we partner with institutions in their mission. Our process directly ties the portfolio back to the institution's goals by identifying future cash flow needs and building a portfolio designed to meet those needs with an appropriate level of risk. Importantly, we align the organization's portfolio with their faith-based convictions.

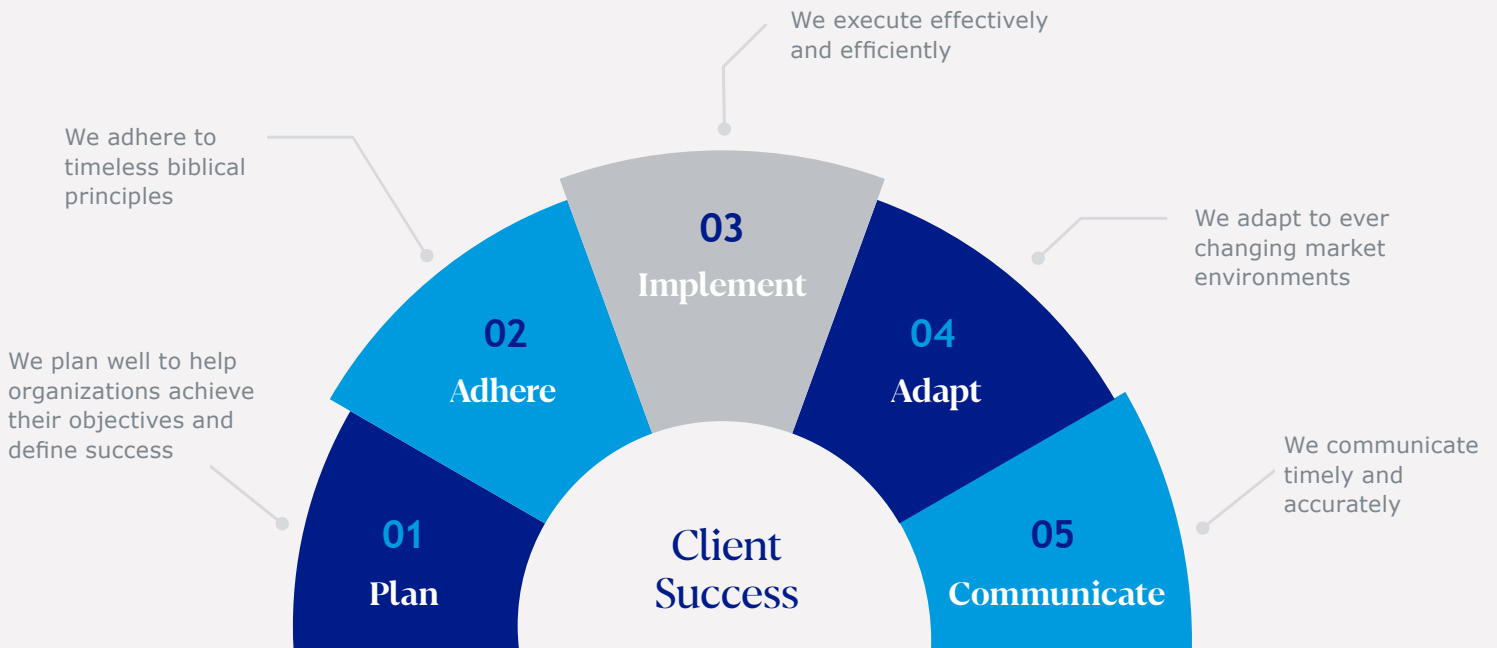
We Serve Institutions By:

- » Offering customized investment counsel
- » Integrating their convictions into their investments
- » Assisting them in stewarding their resources well

Our fully Outsourced Chief Investment Office (OCIO) and non-discretionary investment consulting, include:

- » Asset allocation
- » Customized portfolios based on the institution's values and beliefs
- » Investment Policy Statement (IPS) design, maintenance, and review
- » Investment committee education and support
- » Manage due diligence
- » Cash flow management and other administrative functions
- » Customized investment reporting

Our Approach to Serving Clients



Timeless Foundation and Timely Action

Since 1991, Blue Trust has served ministries and foundations. In our view, the best portfolio for an institution is intuitive, resilient, and ultimately achieves its goals. We define success as achieving your organization's objectives and adding value to your benchmarks. We seek to accomplish this by leveraging internal and external resources and expertise to execute your strategy effectively and efficiently. We specialize in faith-based organizations and would welcome the opportunity to hear more about your investment needs and goals.

"Since our partnership with Blue Trust began, their dedication and expertise have played an instrumental role in the success and growth of our endeavors. Their ability to navigate complex financial landscapes and provide insightful guidance from a biblical perspective have been invaluable."

- Wayne Swindler*, President of ADF Foundation

BlueTrust
INSTITUTIONAL

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Blue Trust advisors apply biblical wisdom and technical expertise to help clients make wise financial decisions to experience clarity and confidence and leave a lasting legacy. With \$59 billion assets under advisement and a nationwide network of 17 offices, we offer comprehensive financial services and objective advice to more than 10,000 clients across the wealth spectrum in all 50 states (as of 6/30/24 and subject to change).

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*The client's experience may not be representative of the experience of other clients and is also not indicative of future performance or success.