

Floor Committee #11: Subsidiaries and Benefits Plans

Subject: WELS Investment Funds

Reference: *Book of Reports and Memorials*, pp. 179-181

Report No. 04

WELS Investment Funds provides investment opportunities for organizations affiliated with our synod, such as congregations and schools. It manages more than \$330 million in investments for more than 250 WELS ministries. WELS Investment Funds offers four investment portfolios:

- The WELS Balanced Fund
- The WELS Endowment Fund
- The WELS Equity Fund
- The WELS Income Fund

Despite some uncertain economic times recently, “The WELS investment portfolios have notched solid returns amid these challenges, benefiting from the discipline in staying in the market and prudent risk management through diversification.” Anyone in charge of long-term investments for their congregations or schools should contact Jim Holm, executive director of WELS Investment Funds, at jim.holm@wels.net.

Pastor Matthew Frey, chairman
Mr. Duane Vance, secretary