

MANAGEMENT SERVICES FOR YOUR CHURCH AND ASSOCIATION

(Cemetery, Scholarship, Camp, New Work, Reserve Funds and others)

WHY YOU SHOULD CHOOSE THE GEORGIA BAPTIST FOUNDATION

The Georgia Baptist Foundation, Inc. was established in 1941 for the specific purpose of gathering and managing endowment funds for the various Georgia and Southern Baptist agencies and institutions. The funds now managed by the Foundation have a market value of approximately \$350 million in over 1600 trusts.

The Foundation has six primary goals in working with Baptist clients:

1. ***Competitive returns with minimal risk.***

The Foundation uses professional investment management firms to manage all endowment funds. These managers are restricted to conservative investment guidelines adopted by our trustees.

2. ***Low Cost***

By participating in the Foundation's large endowment pool, the client gets professional management at a far lower cost than in an individual account. At the present the cost is .55 of a percent annually.

3. ***Flexibility***

The Foundation has the ability to manage funds for associations, churches, agencies and institutions on either a revocable or irrevocable basis. In addition, income payout periods can be adjusted to meet the needs of the client. The income is the same on either basis.

4. ***Predictable income stream that is protected from inflation.***

The Foundation has adopted a unique method of income payment (called a "spending policy") that provides participants year-to-year predictability of income, as well as providing protection from inflation. The income is based on the number of units your fund holds in our common investment pool times the spending policy dividend rate set by our trustees.

5. ***UPMIFA Compliant***

On 7/1/2008, the Uniform Prudent Management of Institutional Funds Act became law. This law governs the investment and spending of all donor established endowment type funds. Fund administration by the Georgia Baptist Foundation can help insure compliance with the applicable law and best practices.

6. ***Assistance in raising additional endowment.***

The Foundation has a trained staff of development officers available to assist you in your Planned Gift Program.

PLEASE CALL FOR ASSISTANCE

NORTH OF MACON: Sam Warner at (770) 452-8338

SOUTH OF MACON: Ray Sullivan at (229) 392-1494

OR (800) 452-9064

WEBSITE: www.gbfoundation.org



Georgia Baptist
Foundation