

FAITH-CONSISTENT INVESTMENT POLICY ASSESSMENT SERVICE

Is your investment policy an **authentic reflection** of your organisation's faith values?

Faith-consistent investing aligns investment decisions with a faith tradition's religious beliefs and values through a comprehensive approach that transforms how you invest. This includes screening to avoid conflicts with faith principles, actively seeking investment opportunities that support causes consistent with your mission, pursuing thematic and impact investments that address global challenges, and engaging as active shareholders to promote corporate practices aligned with your values.

Why **faith-consistent investing** matters

In an era where both donors and members of faith communities expect transparency, showing that you are taking steps to align your investments with your faith principles strengthens trust and integrity. It allows organisations to manage their resources responsibly – pursuing financial sustainability while avoiding supporting activities that conflict with their moral commitments – ultimately making their investments a living expression of their faith in action.

“By taking a holistic, long-term view that considers systemic risks and opportunities, FCI can not only align with investors' values but also potentially enhance long-term financial performance.”

Dave Zellner, Executive Chair of FaithInvest

The **challenge**

Governance bodies aspire to align investments with organisational values but often lack the specialised knowledge or assessment tools needed to evaluate their current policies. They also struggle with balancing values alignment with their fiduciary duty to prudently manage assets.

In addition, many investment policies – the strategic document that outlines your investment goals and objectives – contain vague language about values alignment, lack guidance on implementing investment decisions, or fail to translate theological principles into practical investment criteria. This may undermine accountability, lead to decisions that conflict with faith commitments, and cause investors to miss opportunities for proactive, mission-aligned investments.

The **solution**

FaithInvest bridges this expertise gap with professional assessment services that demonstrate how investment policies can authentically reflect faith values while maintaining prudent asset management.

Drawing on decades of investment experience at multi-billion dollar faith-based institutions and input from over 2,500 member subscribers across diverse faith traditions, we exist to support faith-based organisations in aligning their investments with their beliefs.

We understand that this journey can seem complex, and we're here to help guide you through every step of the process.

What we **offer**

Our Investment Policy & Guidelines Assessment Service provides:

- **Professional evaluation** – Comprehensive analysis of how well your investment policy reflects your faith values
- **Expert recommendations** – Specific, actionable guidance tailored to your organisation's capacity
- **Implementation roadmap** – Clear priorities and practical next steps for improvement

- Plus**
- **Ongoing support** – Consultative services to help implement recommendations
 - **Free entry point** – Level 1 assessment available at no cost to all faith-based organisations

How it works: Three levels of assessment

Level	Best for	Key features	Fee
1. Basic scorecard	Organisations beginning their FCI journey with limited FCI expertise and/or resources	50-point review, basic exclusions, governance check	Free
2. Intermediate scorecard	Organisations ready to advance meaningfully beyond basic exclusions toward comprehensive values integration	75-point review, values integration, governance & engagement strategies	Fee-based
3. Advanced scorecard	Organisations that aspire to lead in innovation and sophisticated faith-consistent investing practices	100-point review, advanced integration, industry leadership guidance	Fee-based

Level 1: Basic assessment (FREE)

Perfect for organisations that have taken their first steps toward faith-consistent investing. Available to any faith-based organisation regardless of size. Includes an optional free 30-minute consultation to answer questions and explore next steps.

Level 2: Intermediate assessment (fee-based)

Comprehensive evaluation for organisations ready to advance beyond basic exclusions toward sophisticated values integration.

Level 3: Advanced assessment (fee-based)

Sophisticated analysis for organisations leading innovation in faith-consistent investing practices.

Sample **case study**: **From intention to action**

This example is modelled on real assessments of IP&Gs (investment policies and guidelines) by FaithInvest in order to illustrate our methodology. It is fictional but represents real world scenarios.

First Presbyterian Church of Riverside wanted to ensure its investments truly reflected its faith values. FaithInvest's free **Level 1 Assessment** of FPCR's Investment Policy & Guidelines revealed a score of 28 out of a possible 50 points – a solid foundation but with clear room for growth.

We identified three key opportunities:

- **Tighten exclusion criteria** to avoid unaligned sectors
- **Improve asset manager selection guidelines**
- **Strengthen stakeholder communication** about investments

Within weeks, the church had an implementation roadmap in hand with clear, actionable steps to advance its faith-consistent investing. The intended result? A confident governance team, a plan for stronger alignment, and renewed trust from its congregation.

Please contact FaithInvest if you would like to see the full sample case study, which includes the example Investment Policy and Assessment. Professional assessment services for Levels 2 and 3 involve fees reflecting the comprehensive analysis provided. Like other specialised investment consulting services, these assessments represent professional oversight expenses that enhance portfolio governance and risk management. Contact us for detailed fee information.

Getting **started**

Ready to align your investments with your faith values? Contact us at info@faithinvest.org to begin your complimentary **Level 1 assessment** today. We are happy to discuss the process and answer any questions in advance.





Beyond the assessment

As well as our IP&G assessment services, we also offer comprehensive consultative services to help implement recommendations and best practice. These include:

- Asset manager due diligence questionnaires
- Ongoing monitoring and scoring of manager adherence to faith-based criteria
- Training programmes such as our **Faithful Finance** course on the fundamentals of faith-consistent investing
- Periodic reassessments as best practices evolve

Free resources

We have a library of resources, guides and case studies, which are freely available to help faith-based organisations implement faith-consistent investing (FCI).

These include our just re-issued foundational guide to faith-consistent investing, *From Faith Values to Investment*, published in October 2025, which has been greatly expanded and updated.



FCI Forum



We have a lively and active FCI Interest Group Forum that meets online every quarter to discuss issues on FCI facing faith-based investors. These are short (45-minute), focused and solutions-oriented meetings that are open to subscribers to our network.

We also publish FCI Research posts each week on topics of relevance to faith-based asset owners. Scan the QR code to find out more!

info@theFCIcentre.org

Is your money **working for you** in the way you would like it to?
If not, we can help

About **The FCI Centre of Excellence**

The FCI Centre of Excellence was founded by international NGO FaithInvest in response to requests from faith-based asset owners. It has been created to be an authoritative resource for faith-consistent investing – from resources, templates and tools, to the latest news and developments in the FCI ecosystem and, of course, a vibrant community of faith-based institutional investors. It is managed by FaithInvest. We do not provide investment advice or make investment decisions for faith-based asset owners. Our IP&G assessment framework reflects best practices for institutions at each organisational level and evolves continuously as the field advances.

Our expertise: We combine paid staff and experienced volunteers with decades of investment experience at multi-billion dollar faith-based institutions. Our methodology is based on extensive analysis of faith-based investment policies and input from over 2,600 subscribers across diverse faith traditions.

Our funding: FaithInvest is primarily funded by philanthropic organisations devoted to supporting efforts to improve the lives of people and planet. Fees charged cover project costs and support our mission.

Our credentials: FaithInvest is a registered charity in England and Wales (1187015) and a registered company limited by guarantee (11862410). We have been deemed equivalent to a 501(c)(3) public charity in the United States by NGOsource.



We strongly encourage well-documented 'front door' language: How will key beliefs, teachings and values manifest themselves in our investments? Strong, clear language around this is of vital importance because it's the anchor for everything else that follows.

