

# WELS Investment Funds—

providing cost-effective, professionally managed investment portfolios to help organizations achieve their ministry goals

**In response to requests from WELS congregations, WELS Investment Funds was established in 1997 to offer the same investment management resources used for the synod scholarships and endowment funds to all WELS and WELS-affiliated ministries.**

Pooling our resources allowed us to take advantage of institutional investment opportunities and lower investment costs not available to smaller investment accounts.

## The benefits

- **Ease of use.** Our professional staff can meet with your organization to discuss your investment options and guide you through the steps to open and maintain an investment account.
- **Strength in numbers.** As more congregations and organizations invest in WELS Investment Funds, the cost savings benefits increase. It's another way we can support each other.
- **Proven history.** Established in 1997, WELS Investment Funds managed \$286 million for 251 WELS and WELS-affiliated ministries as of March 31, 2023.



Connect with us to see how we can help you achieve your ministry goals. Visit [wels.net/welsfunds](https://wels.net/welsfunds).

## What investors are saying



“If I have a question on a transaction or an investment question, knowing that I’ll have a friendly person on the other end that I know—a fellow WELS employee—it’s a great benefit for me. You can’t go wrong with using WELS Investment Funds for your financial investments.”

—**Mr. Brian Treichel**, *business manager & treasurer, Wisconsin Lutheran Seminary*



“They really help us focus more on ministry rather than managing money, and I wish we would have gone with WELS Investment Funds sooner. What they have done for us is immeasurable. It was one of the best decisions we ever made. They have made us good stewards of God’s blessings.”

—**Mr. David Bartelt**, *former vice president, Kettle Moraine Lutheran High School Foundation*

## Contact us

Executive Director Jim Holm, CFP®, at [jim.holm@wels.net](mailto:jim.holm@wels.net) or 414-256-3206

Investor Services Specialist Monica Peavy, at [monica.peavy@wels.net](mailto:monica.peavy@wels.net) or 414-256-3207