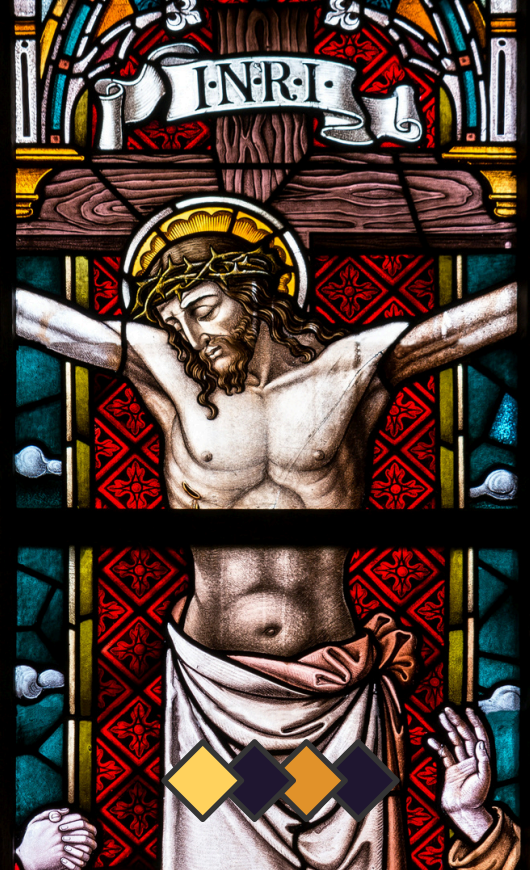




**The Foundation**  
For the Diocese of Helena

# Parish Investment Fund (PIF)



## Why Choose PIF?

1

PIF actively stewards your parish's resources by generating positive return on the gifts generously given, so you don't have to.

2

PIF invests according to the United States Conference of Catholic Bishops' (USCCB) socially responsible investment guidelines.

3

PIF helps parishes fulfill their legal fiduciary duties, honor donor intent and reduce the ongoing burden of fiscal governance.

4

PIF enables you to track and transact multiple accounts, across diversified investment pools, on-line and on a daily basis.

## Services



Independent professional recordkeeping and daily valuation access for each parish entity.



Built-in fiscal governance and expertise from the Foundation with fiduciary oversight, audits, transparency and accountability.



Low-cost, & diversified USCCB investment pools designed to grow resources & align with each parishes' unique investment time horizons.



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# Money Sources

Parish income sources, including gifts, come in many forms. Some gifts may be designated for a particular purpose. Parishes have a fiduciary duty to be prudent stewards of their resources and to honor donor intent. The Foundation PIF offers multiple money sources to 1) help parishes plan and fund competing financial priorities and 2) honor donor-designated gifts.



**Ministry**



**Mission**



**Maintenance**



**Other**

## Investment Options

Competing financial priorities mature at different times. While a leaking roof needs to be repaired soon, replacing a roof requires planning and funding over time. PIF maintains four diversified investment pools to align unique time horizons with the risk and reward relationship of investing.

**<1 Yr**

### Money Market -

Money marketing fund built largely of US treasuries for principle preservation

**3-7 Yrs**

### Growth & Income -

50% of the funds invested in fixed income and 50% invested in stocks

**1-3 Yrs**

### Conservative Growth & Income -

70% of the funds invested in fixed income and 30% invested in stocks

**>7 Yrs**

### Aggressive Growth & Income -

30% of the funds invested in fixed income and 70% invested in stocks

*"From everyone to whom much has been given, much will be required: and from the one whom much as been entrusted, even more will be demanded." ~ Luke 12:48*



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