



Investments

Reflecting UCC faith-based values in the management of members' pension assets.

Investment Options

The Annuity Plan for the United Church of Christ, a pension plan administered by the Pension Boards, is a defined contribution plan and is the primary retirement income vehicle for most plan members.

We offer **11 investment options:**

- Stable Value Fund
- Bond Fund
- Sustainable Balanced Fund
- Equity Fund
- Six Target Annuitization Date (TAD) Funds
- Global Sustainability Index Fund



Investing Made Simple

Investing in Target Annuitization Date (TAD) Funds may be your answer to worry-free investing.

TAD Funds offer you the opportunity of spending less time allocating investments, and more time planning for retirement. Simply choose the fund that is closest to the year of your anticipated retirement and determine your contribution amount. Our investment professionals will do the rest!



Sustainable Balanced Fund

The “best-in-class” Sustainable Balanced Fund offers an asset allocation between equities and bonds that replaced the former Balanced Fund’s allocations.

We selected and approved five leading managers in sustainability and climate solutions while also demonstrating historically compelling returns.



Sustainable Investing



Social Bonds finance projects that address social issues for targeted populations.

Green Bonds offer investors opportunity to participate in financing 'green' projects that help mitigate climate change.

The projects we invest in through our Social and Green Bonds aligns with our UCC values.





Fighting COVID-19 through investments

As part of #PBUCC's sustainable investing approach, we have invested in the African Development Bank "Fight Covid-19 Social Bond." This bond supports African communities to help curb the spread of the virus and overcome the many challenges caused by the outbreak.



Addressing Social Inequality Through Investments

We also invested \$6.6 million in **Bank of America's \$2 billion** bond deal called "Equality Progress Sustainability Bond," which will help fight against income and social inequality in America's Black and Hispanic communities.



Investments with Purpose

When you invest in sustainable bonds through investment options offered through the Pension Boards, the proceeds invest in work that supports:

- renewable energy projects
- energy efficiency
- clean transportation
- sustainable waste management
- water management
- biodiversity conservation
- climate change adaptation



Affordable Housing

The Pension Boards invested \$3.5 million in Fannie Mae's \$315 million Multifamily Social Bond, under Fannie Mae's Guaranteed Multifamily Structures program.

Proceeds of the social bond investment will finance the acquisition or refinance affordable housing property for low-income renters or borrowers.

