



CAPTRUST Religious Services

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When I first started working with the Catholic Archdiocese back in 1985, I had a unique challenge that was presented to me to understand what the U.S. Conference of Catholic Bishops has stated in its objectives for how to invest. Socially responsible investing is an exclusionary process where you cannot hold anything in your investment portfolio that goes against the teachings of the Catholic Church. The common misconception is that you have to sacrifice investment returns in order to be socially responsible.

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And what we found is that's not the case. I mean, you can have a competitively cost portfolio as well as having it socially screened and deliver the returns you want to be delivered. We've been investing and constructing investment programs in a Catholic, socially responsible way for 35 years. Today, we're very proud to say that we oversee more Catholic, archdioceses and dioceses than any other firm and the other team in the country.

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Our clients span from Vermont to Alaska. And being a member of each one of the communities, they feel like we're a partner with them in everything that they do. What's important to our clients is independent advice. We're proud to say we are fiduciaries. We take that very seriously and we give unconflicting advice. When we first come in, we review your whole entire portfolio. We discuss your risk tolerances.

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We want to know what your goals are, what your spending policy is, how much money you need today, how much you're going to need in the future to continue with your mission, your foundation,



your endowment, and the charitable organizations that you're supporting. Management and committees at each diocese have their hands full. Our goal is to really take the financial aspect off your plate and let you get back to the day-to-day business of running the parish. Catholic organizations are some of the oldest organizations in the world, and stability is in their DNA. Stability.

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is in CalPTrust DNA as well. Because of the depth and the breadth of the resources we have, we're able to get access to investment programs they otherwise would not see. It's not one person or a couple people doing investment research. We have 40 plus individuals that are constantly looking at these names, building these portfolios, and giving recommendations to our clients. There is such a tremendous organization behind us.

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We know that we are going to be able to deliver the best-in-breed investment management advice, and we don't have to compromise on any of our values to do so. Any challenge that a diocese might face or dioceses might face in the investment world, we've seen before. So we're able to go in there and really understand the complex needs of each archdiocese and really leverage the weight of this \$300 billion in assets to work on behalf of the client. Through the referrals of our existing clients, we have branched out

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not only to Archdiocese and diocese, but to Catholic universities, Catholic healthcare systems, and various Catholic schools. It's exciting to hear the impact the investment programs have had, the restorations of St. Patrick's Cathedral, the service to the youth in the youth programs, new technologies that have saved people's lives. We're proud that we oversee billions of dollars on behalf of the Catholic Church. We're proud that we oversee

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the retirements of hundreds of thousands of Catholic employees. We have the people, we have the process, and we have the passion. It's not a job for me, it's a career. It's an opportunity to leave a legacy and further the mission of my church.

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