

FOR IMMEDIATE RELEASE

**Foundation Investment Diversity a Key Strength of Asset Management,
Planned-Giving for Disciples Ministries Remains Strong**

INDIANAPOLIS, May 1, 2025. Reviewing market dynamics, celebrating donor impact, and setting the 2026 defined-Income rates were among the wide range of discussions and actions during the April 27-29, 2025, meeting of the Christian Church Foundation, Inc.'s (Foundation) Board of Directors.

Keenly aware of the current dynamic market environment, the Board spent extensive time with its investment consultants. In reviewing the markets' historical responses following prior sustained economic downturns (1973 -1974 Oil Crisis; 2001 Dot Com Recession; 2008-2009 Global Financial Crisis; 2020 COVID-19 Recession), and acknowledging that markets generally perform positively following significant downturns, fully regaining or surpassing the prior indexes in no later than three years, the Board reaffirmed the Foundation's long-term investment strategy designed to mitigate market fluctuations and provide income for mission and ministry.



One important principle of the Foundation's long-term investment strategy - diversification of asset classes - was highlighted as an important key to stability across all Foundation investments. The Foundation's investment portfolios contain a wide range of asset classes including domestic and international equities (stocks), flexible capital, fixed income (bonds), and real assets. "Investments for the benefit of our donors and partners are central to the Foundation's mission. Our strategic, disciplined investment strategy remains our strength," said Matt Rosine, Foundation president.



Despite changing economic conditions, the Board retained the 2025 defined-Income rates for the Joint Investment Trust (JIT) for 2026. The JIT is the Foundation's comprehensive, long-term investment program for ministries and partners of the Christian Church (Disciples of Christ). The 2026 JIT defined-Income rates are as follows:

Common Balanced Fund	3.75%
Beasley Growth Fund	4.00%
Campbell Multi-Strategy Fund	4.25%
Bostick Select Fund	4.00%
Brown Income	2.00%

Providing the rates now, which will be effective for the 2026 calendar year, allows ministries to faithfully budget for the coming year.

Planned-giving and other gifts through the Foundation for support of Disciples mission and ministry were again strong in 2024. Last year, combined gifts, including permanent funds, gift annuities, charitable trusts, and other gifts, exceeded \$16 million.



In 2024, the Foundation distributed \$12.9 million for mission and ministry from gifts entrusted to the Foundation. Additionally, partner ministries received \$19.7 million in Income distributions from their long-term investments managed by the Foundation.

Also during the meeting, the Board heard from Josh Zinner, CEO of Interfaith Center on Corporate Responsibility (ICCR). The Foundation is a founding member of ICCR, a coalition of faith- and values-based investors who view shareholder engagement with corporations as a powerful catalyst for change. Zinner shared, “Faith-based investors like the Foundation play an important role in addressing workplace and healthcare inequalities, advocating for the environment; and combating abuses in the global supply chains.”



In other business, the Board of Directors elected four new members whose terms will begin in January 2026, including Rev. Dr. Dale Braxton (Fort Deposit, AL); Joni Hires (Midland, TX); Rev. Diana Hodges-Batzka (Florence, KY); and Betty Ridout (Des Moines, IA).

The Christian Church Foundation is a general ministry of the Christian Church (Disciples of Christ). The Foundation serves Disciples by gathering, stewarding, and distributing dollars for mission.

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