In 1988, the first ELCA social purpose (SP) funds were created to address moral outrage over apartheid. Since then, they have helped ELCA Retirement Plan members save for the future while making a positive difference in the world today.

- **8 ELCA SP funds**
  - SP 80e Balanced Fund
  - SP 60e Balanced Fund
  - SP 40e Balanced Fund
  - SP Global Stock Fund
  - SP Non-U.S. Stock Fund
  - SP U.S. Stock Fund
  - SP Bond Fund
  - SP Stock Index Fund

- **Over $1 billion invested**
  - $1.28 billion in SP funds as of June 30, 2019

- **About 1/3 choose SP funds**
  - 18% of members under age 35
  - 29% of members age 35 – 49
  - 33% of members age 50 – 64
  - 37% of members age 65+

- **9 social criteria screens guide investing**
  - ELCA Screens: Alcohol, Community Development, Environment, Gambling, Military Weapons, Political and Civil Rights, Pornography, Private Prison, and Tobacco

- **Recent areas of focus**
  - Environment, human rights, and private prison screens
  - Community development investment in the Holy Land
  - Investment in renewable and energy-efficient companies

**Want to be an SP fund investor?**

Call a Portico Financial Planner at 800.922.4896

ELCA Retirement Plan members can invest some or all of their ELCA savings in one or more SP funds. Find out if you’re already in an SP fund, discuss if you want to be an SP investor, and take steps to make it happen. Or, see your funds and make selections online at myPortico.PorticoBenefits.org.

You should carefully consider the investment objectives, risks, charges, and expenses of any fund before investing in it. All funds are subject to risk. See the Guide to Investing and Investment Fund Descriptions for more information about ELCA funds.

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**Restoring Creation Together**

You’re holding in your hands an example of church together. At Churchwide Assembly three years ago, Portico Benefit Services and Lutherans Restoring Creation (LRC) addressed climate change from very different perspectives. This year, we’re collaborating.

Will you join us? Environmental issues can feel overwhelming but it’s when we stand together, each doing our part, that we find hope, gain strength, and make a difference.

Rev. Jeff Thiemann  
Portico President & CEO &  
Phoebe Morad  
LRC Executive Director

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**First, Join Up**

**Take the LRC Personal Covenant**

In 5 – 10 minutes, complete your personal covenant with creation and identify your next earth-keeping step. You’ll start to receive LRC’s monthly Good Green e-News linking you to other Lutheran earth-keepers and helpful resources.

**Invest Consciously**

Ask if your retirement plan offers socially conscious investment funds. ELCA Retirement Plan members can access Portico’s eight social purpose funds — details on back.

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**Then, Inspire Others**

**Children & Youth**

LRC offers the Child’s Pledge with Creation and a youth pledge inviting teens to consider their impact on global neighbors.

**Your Congregation**

Help your people sign the congregational covenant and create an action plan with support from LRC mentors.

**Your Synod**

Already an active earth-keeper? Talk with LRC about becoming a Green Shepherd in your synod.

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**Portico Benefit Services**

The ELCA’s Benefit Ministry

As the ELCA’s separately incorporated benefit ministry, Portico creates comprehensive benefit solutions for staff at faith-based organizations, and their families. Responsible for approximately $8 billion in assets under management, Portico advances the church’s corporate social responsibility ministry with guidance from ELCA social teachings and policies.

With all 20 ELCA Retirement Plan funds, Portico uses shareholder advocacy to influence corporate behavior. With eight social purpose (SP) funds, Portico goes a step further, investing in companies demonstrating positive social impact and screening out companies with negative impact.

**Examples of progress:**

- Filed 27 environment-related shareholder resolutions since 2016, prompting 16 companies to take actions like publishing environmental disclosures and setting emission reduction targets.
- SP investments like Impax Asset Management are reducing CO2 emissions, generating renewable electricity, saving water, and recovering waste.
- Portico now screens out from SP funds the companies responsible for about 2/3 of potential CO2 emissions from the Carbon Underground 200™ list.

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**Lutherans Restoring Creation**

A Grassroots Movement

Lutherans Restoring Creation (LRC) is a movement born out of long-standing ELCA concern for the environment — defined by the 1993 social statement Caring for Creation: Vision, Hope, and Justice.

Now an independent non-profit, LRC’s many leaders — laity, pastors, synod leaders, scholars, and others — believe that cultivating a network of earth-keepers supported by theology and practical resources is helping to deepen faith, increase commitment, and revitalize church life.

**Examples of progress:**

- Encouraging adults, youth, and congregations to pledge their commitment online and connect with nearby earth-keepers.
- Trained over 600 people as guides to LRC’s vast online collection of materials, worship ideas, and planning tools.
- Established Green Teams in over 20 states with dozens of Green Shepherds trained to mentor congregations.
- Helped 21 ELCA congregations measure and track their own energy and water consumption, as well as greenhouse gas emissions.

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“"As I ponder the future of the church, the work of LRC gives me hope for a new way for us to envision our life together — as an ecosystem of interconnectedness, dependent on one another and the created world.”

Noni Strand  
Green Shepherd  
Central States Synod

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**2016 Churchwide Assembly Social Policy Resolution**

Investing in and Encouraging Clean, Renewable Energy

“To encourage ELCA members, congregations, synods and agencies to examine lifestyles and environmental footprints as they impact climate change, improve their stewardship of energy resources, transition to renewable energy sources and promote care for God’s creation.”

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Rev. Jonathan Barker  
Grace Lutheran Church  
Kenosha, WI

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