



TOUCHSTONES

INVESTMENT CONSULTING • FIDUCIARY AND SRI COUNSEL • VIA GEM FOUNDATION PROGRAM

2007 Top Ten (plus one) Value Propositions

The following are “value-added” successes achieved this past year through ViaGem Consulting services relating to the portfolios and processes of clients and affiliates.

Investment Consulting

1. **Return/Risk Reward** – Enhanced portfolio results through the use of expanded investment vehicles beyond traditional asset classes to achieve broader diversification and less risk over time.
2. **Expanded Reports** – Upgraded IT systems for more relevant data, analyses, trends, and tracking to provide more information and clarification to help decision makers.
3. **Consolidation of Funds** – Organized a multitude of funds into consolidated accounts to minimize costs and paperwork, and increase flexibility for easy access and greater control.
4. **Currency Issues** – Improved application for managing multi-currency investments for international organizations from both the operational and investment strategy points of view to mitigate effects of currency volatility.

Fiduciary Practices

5. **Global “Best” Practices** – Presentation prepared for *Prudent Investment Stewards* in the U.S. and in Rome using a comprehensive (but easy to follow) approach to the investment process – Organize, Formalize, Implement, and Monitor. *Great Educational Piece!*
6. **Investment Committee Development** - Advanced the expansion of investment committees through an assessment of their current situations, and recommended actions regarding the search, qualification, and decision process for new committee members.

This newsletter, for faith and mission-based organizations, presents pertinent information relating to our work, industry best practices, and real life experiences.

7. **ViaGem Foundation Program** – Worked with organizations, in developing areas, to help them structure their investment and financial programs to make them more financially secure and focused for the future.

Socially Responsible Investing (SRI)

8. **Progress toward Health Care Reform** – Initiated action toward change by engaging an international corporation, through a shareholder resolution, requesting they provide corporate leadership and responsibility by adopting principles in support of this important SRI issue.
9. **Alternative Investment Programs** – Developed strategies and structures for funding low income housing projects and made contacts with partners to expand global microfinance opportunities to help entrepreneurs in developing countries.
10. **Connecting Resources with Needs** – Connected financially stable organizations, who are willing to consider providing financial support (through low-interest loans or grants), with other organizations seeking additional financial capital.
11. **Reconfiguration** – Designed a consensus-based approach for combining two or more institutes’ investment portfolios and processes, including synthesized investment policies and guidelines from which to carry on the investment process; (based on a thorough understanding of the needs, objectives, perspectives, values; and the investment situation and strategies of each group).

We are privileged to have the opportunity to serve your organization and wish you and yours blessings this Christmas Season and throughout 2008.

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