

# Unity of Lehigh Valley

## Financial Investment Strategy

We the Board of Trustees for Unity of Lehigh Valley (here after referred to as *The Board*), put forth this statement of guidelines for the investment and strategic planning of monies entrusted to The Board by the Membership at Large of Unity of Lehigh Valley (here after referred to as the Membership).

### **Prayer**

There is no proposition Financially, Ministerially, in Office Maintenance or Personnel Hiring that is not first presented to the Universe in Prayer and Meditation. Our church is built on a consciousness of prayer, and therefore our investment strategies shall be built on this prayerful consciousness.

### **Basic Strategies**

The Board will invest the money entrusted to it by the Membership with due diligence, spiritual guidance and the advice of proven financial advisers. The Board will endeavor to diversify Unity of Lehigh Valley's investments to reduce market risk factors. The Board will at all times endeavor to actively pursue aggressive growth strategies while using protective investment vehicles to guard against gross loss of funds. The Board shall invest the money entrusted to it in alignment with the spiritual principals of Unity of Lehigh Valley by supporting socially, ethically and environmentally aware investment opportunities.

The Finance Committee will review the financial investments annually and make recommendations to The Board based upon market conditions and Unity of Lehigh Valley's strategic initiatives and capital plans and budget.

### **Risk Awareness and Tolerance**

The Board understands that investment in the stock market can be volatile, and therefore sets our Tolerance level in these regards at Low.

### **Goals**

- The Board will at all times keep a 2 month operating cost cushion.
- The Board will establish and maintain a 3-year capital budget plan
- Unity of Lehigh Valley will own its own space for Service and Office space. This constitutes one of the largest desires of this ministry and membership.
- Current building and space will be maintained in good repair and will be renovated as needed to remain in alignment with the laws of abundance and prosperity.
- Unity of Lehigh Valley will purchase or build a new church home when the growth of congregational membership and programs so warrants.
- Through right minded investment and spiritual guidance, Unity of Lehigh Valley will continually have funds to support the growth and maintenance of all Services, Programs and Employees under its purview now and in the future.