



**COLORADO
EPISCOPAL
FOUNDATION**

Finance in Service of Ministry

Est. 1983

Annual Report of the **Colorado Episcopal Foundation**
to the **136th Annual Convention** of the
Diocese of Colorado
October 5-7, 2023

Visit us online: coef.org or call: 303.534.6778

Purpose Statement:

To strengthen capacity for mission and ministry by stewarding the financial resources of the Episcopal Church in Colorado.

Our Board of Trustees:

- Our Core Values:**
- ◆ **Transparency**
 - ◆ **Accountability**
 - ◆ **Integrity**
 - ◆ **Long-term Perspective**

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| The Right Reverend Kym Lucas | Mr. Greg Wright, <i>Emeritus</i> |
| Alec Celecki, <i>Board Chair</i> | Mr. Darren Armstrong |
| The Reverend William Stanton | <i>Standing Committee Representative</i> |
| Mr. Brian Bennett | Mr. Scott Asper |
| Ms. Rebecca Beall- Moore | <i>Executive Director</i> |
| The Reverend Hollis Wright | |

The Foundation supports The Episcopal Church in Colorado by safeguarding the future of the church. We offer financial investment options, property advisement, and planned giving tools at no charge to churches and their members.

- Highlights of last year:**
- ◆ Managed approximately **\$36** million in investments.
 - ◆ Provided investment management services for 70% of all Churches in the Diocese.
 - ◆ Handled **\$750,000** in stock gifts for the benefit of Diocesan Institutions and congregations across Colorado.
 - ◆ Managed and oversaw Endowment of **\$6.6** million.
 - ◆ Prepared and gave presentations to parishes as well as smaller groups.

partnership - programs - perspective