

October 3-5, 2024



# COLORADO EPISCOPAL FOUNDATION

*Finance in Service of  
Ministry*

*Est. 1983*

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

***Core Values: \* Transparency \* Accountability \* Integrity \* Long-term Perspective***

## ***Why Work with the Foundation?***

We have provided financial services specifically designed for Churches and Diocesan Institutions for over 35 years. The Foundation never charges any fees for our services or products. We work with Churches across the Diocese so we know the opportunities and challenges you face. We are local and available to work with you and your parishioners, one on one, any time of the year.

**We are available to provide customized presentations to vestries and other church leadership groups regarding any of our services and products:**

**For Churches and Diocesan Institutions:**

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| <p><b>Investment Management</b></p> <p><b>Endowment Services</b></p> <p><b>Legacy and Planned Giving</b></p> | <p><b>Congregational Loans</b></p> <p><b>Assist Congregations with Property Transactions</b></p> |
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**For Individuals:**

- Stock Gifts**
- Gift Annuities**
- End of life giving options**

**2023 Highlights:**

- ◆ Managed approximately **\$38 million** in investments.
- ◆ Provided investment management services for **70%** of all Churches in the Diocese.
- ◆ Handled over **\$900,000** in stock gifts for the benefit of Diocesan Institutions and congregations across Colorado.
- ◆ Manage and oversee Endowment of **\$8.6 million**.
- ◆ Numerous Parish presentations

**BOARD OF TRUSTEES**

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>* The Right Reverend Kym Lucas</li> <li>* Reverend Canon Jon Anderson</li> <li>* Alec Celecki</li> <li>* Becky Beall-Moore</li> </ul> | <ul style="list-style-type: none"> <li>* Reverend William Stanton</li> <li>* Brian Bennett</li> <li>* Ann Fleming</li> <li>* Bruce Noble</li> <li>* Reverend Will Fisher</li> </ul> |
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**STAFF**

- Scott Asper– Executive Director
- Pandora Smolinski– Accounting Assistant

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