



## What does an FCI Project entail?

### Overview:

FaithInvest accompanies faith organisations seeking to invest in line with their faith traditions. A valued component of this journey of accompaniment is to provide the faith organisation, supported by FaithInvest, the opportunity to integrate their deeply rooted beliefs, teachings, and values into investment strategies.

### Typical Project Outline:

FaithInvest has developed a process for implementing and/or furthering faith-consistent investing. This process generally consists of four stages:

1. Initial – Goal and intention setting
2. Intermediate – Internal review, plus external as necessary
3. Late stage – Board or Leadership review and approval
4. Ongoing monitoring for maintenance and expanded alignment.

### What Commitment is Required?

We find that each FCI project is unique and that the time commitments vary between a few hours of engagement every month (in preparation for Quarterly board meetings for example) or a few hours every week – yielding much faster progress. In total, we find that FCI projects typically last between 9 to 18 months from start to finish; however, this is variable based on each projects goal.

This process involves deep engagement with the core values of the faith, translating these into actionable investment criteria that can lead to meaningful changes in how assets are managed. The commitment to this process ensures that the resulting IP&G is not just a document, but a reflection of the organization's ethos, leading to practical adjustments in investment portfolios.

Ideally, a few representatives of the FBAOs we work with (usually board members) meet with our team every 2-3 weeks for approximately an hour to review the latest investment policy and guideline (IP&G) language as it develops. The aim is to draft new guideline language or iterate on this key document consistently – leading to the end goal of an IP&G that reflects the values of the organisation, guided by its members.

### Why FaithInvest, Why FCI?

- Faith-consistent *investing* is a way for faiths to align, manifest and communicate values.
- Successful FCI requires a thoughtful ongoing balance of faith aspirations with investment pragmatics.
- FaithInvest is an experienced global multi-faith team in an independent non-profit, with the ability to serve as an extension of your staff.
- We have developed an effective process to guide faith-based asset owners to implement (or enhance) FCI from its foundations to implementation.