

**DSUM Foundation's
Stewardship Committee**
presents

**INVESTMENT DIVERSIFICATION &
THE NEW TAX ACT**

**November 10, 2018
First UMC of Phoenix
5510 N. Central Ave., Phoenix, AZ 85012**

Diversifying Your Church's Investments!

10:00 a.m. to 12:00 p.m.

presented by

Karen Manczko, Director, Institutional Relationships
Wespath Investment Management



- ✦ Learn how Wespath's globally diversified funds and access to world-class investment managers can help you meet your unique investment needs.
- ✦ Hear how Wespath's investments create positive change in the world through activities including shareholder engagement with companies to influence corporate behavior, providing loans for affordable housing and community development, and more.

How the new "Tax Act" WILL affect you!

1:00 p.m. – 2:30 p.m.

presented by

Ronald G. Wilson, Planned Giving Director &
Retired Estate Planning Attorney, DSUMF



- ✦ Only 10% of all tax filers will itemize – Should you?
- ✦ Personal exemptions are lost and standard deductions increased – How does this affect you?
- ✦ Proper planning may lead to 95% of filers paying less tax – Will you pay less?

We invite you to join us:

- ✦ Reserve your seat today by calling 602-798-8203
- ✦ Registration Fee is \$10.00 per person (includes materials, refreshments and lunch)
- ✦ Registration will begin at 9:30 a.m.

*The **Desert Southwest United Methodist Foundation** is happy to provide these informative seminars and workshops for all conference clergy, laity and their communities. We do this without expectation because our mission is to provide educational, investment and consultation services to the churches, agencies and boards of the DSC.*