

Investments

General Statement

The position of the Union WELL Inc. in regards to the investing of funds shall be in a manner consistent with the guidelines below.

Guidelines and Procedures

All investments of Union WELL Inc. funds shall be in a manner which provides 1) security of funds, 2) necessary accessibility for fund usage, and 3) optimum return on investment. Without negation of security, availability, or interest income, the Union WELL Inc. Board of Directors intends that Union WELL Inc. funds will not be invested in a manner which will support the continuation of any corporation's overseas business practices when those business practices are shown to provide a negative impact on the society of the country or countries involved. Further, it is the Union WELL Inc. Board's intent that Union WELL Inc. funds will be invested in a manner that is consistent with present and/or future State of California policies and/or laws regarding socially responsible investment practices for the State Pooled Money Investment Fund (LAIF) or similar Investment Option.

Change History

Adopted: September, 1978

Updated: December 9, 2013

Updated: March 5, 2008

Updated: May 9, 2002