

Invest Ethically & Confidently

When you invest with us you are directly supporting the mission of the Uniting Church.

Uniting Church SA Investment Fund Ltd
ABN 46 620 095 472 | AFSL 501022

ucinvest

Acknowledgement of country.

This booklet is produced on the lands of the Kurna people. We are deeply grateful for their stewardship of the land on which we live, work and play and we pay our respects to their Elders past and present. We celebrate the continuous cultural, spiritual, and physical connection that our First Nations peoples have to their land, waters and community, and we commit to truth-telling, seeking justice and healing.

I am constantly reminded of the breadth of mission, service, and care we offer as the Uniting Church in South Australia. With this comes a significant responsibility, and an impact that extends across our state and nation. It is a joy to witness individuals and congregations living out their faith as they respond with love and commitment to the needs of their local communities.

Each year, our Synod is blessed to receive contributions from UC Invest. These resources enable us to strengthen and expand the reach of our many ministries and programs. In addition, UC Invest has made a remarkable commitment to support the Uniting Foundation in funding community projects over the next five years an investment that will touch countless lives.

Rev Peter Morel.

Moderator



What is UC Invest?

UC Invest is the investment arm of the Uniting Church in South Australia. For decades we have provided financial products to individuals, congregations, schools, and church organisations which help them manage their financial resources.

More than a financial institution, UC Invest exists to support the mission of the Church. UC Invest can provide investors competitive returns, while helping finance ministry, property development, community services and other initiatives which strengthen the work of the church.

Benefits of investing with UC Invest.

- Every investment helps support Uniting Church Congregations & Communities in SA
- Help fund church grants and ministry centres
- Fast and in house customer support
- Faith & value aligned investing
- Competitive interest rates
- **\$38.8 million in grants** distributed since 2012



Products Available to Individuals.



31 Day Notice.

Our 31-Day Notice Account lets you earn competitive returns while keeping your money accessible. Simply give us 31 days' notice before you withdraw.



Fixed Term Investment.

A Fixed Term Investment with UC Invest allows you to earn competitive returns by committing funds for a set period between three months and three years.



Funeral Fund.

Opening a Funeral Fund is a convenient way to save for your funeral expenses that offers peace of mind: knowing there's a plan for contributing to funeral and related expenses.



If you'd like to learn more about our investment products then please scan the QR code above!



Bella and Michael.

Retail Investors

"We would absolutely recommend UC Invest to others. The interest rates are fabulous, but I think the thing that stands out above all else is the personal service."



Hear from our grant recipients.



Rev Ruthmary Bond.

Minister, Broadview UC

"The UC Invest backed grant enabled the creation of a dedicated intercultural ministry role, offering practical support for inclusive worship."



Rev Lesley Vince.

Minister, Summertown UC

With UC Invest's support, this church is no longer asking whether it can engage its community, but how many more ways it can do so.



Craig & Kay.

Team Leaders, Mitcham Hills UC

"The first full-time person we employed was a children and youth pastor, and that was made possible because of the UC Invest backed grant."



Scan to read all grant recipient stories!



UCA SA Ethical Investment Policy.

At UC Invest, we believe your money should reflect your values. That's why every investment decision is guided by a robust Ethical Investment Policy grounded in Christian stewardship, social responsibility and care for creation.

Our investment approach excludes industries such as **gambling, pornography, tobacco, armaments, thermal coal extraction and other activities that may cause harm to people, communities or the environment.** Instead, we seek opportunities that align with strong environmental, social and governance standards and contribute positively to society.

By investing with UC Invest, you can have confidence that your funds are aligned with the Uniting Church SA's Investment Policy.



WHAT WE AVOID

We do not invest in industries or activities that cause harm to people, communities or the environment.

- Gambling
- Pornography
- Tobacco
- Armaments & Weapons Manufacturing
- Thermal Coal Extraction
- Activities that contribute to injustice, human rights violations or environmental harm



WHAT WE SUPPORT

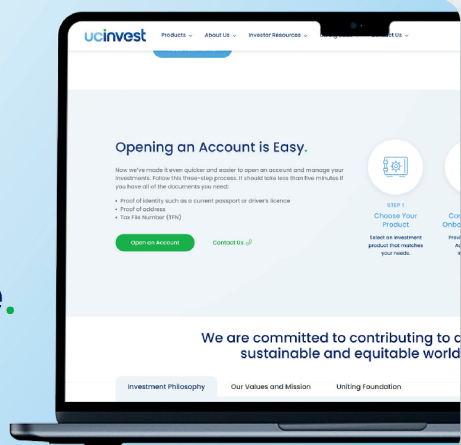
We seek opportunities that align with strong ethical standards and create positive impact.

- Responsible Corporate Behaviour
- Sustainable Business Practices
- Strong Environmental Stewardship
- Socially Responsible Investments
- Ethical Governance
- Positive Community Impact



Did you know about?

Opening an account online.



Start investing with UC Invest in just a few simple steps. Our secure online application process is fast, convenient and can be completed in five to ten minutes, making it easier than ever to grow your savings while supporting the work of the Church.

Getting Started.

To open an account online you'll need to:

1. Be 18+ years of age
2. Have 5–10 minutes
3. Be an Australian Resident
4. Have either an Australian Driver's License or an Australian Passport

Note: This option is currently available only to Personal Investors.



Scan to open an account!

Paper based forms are also available to open an account. Give us a call on **1300 274 151** (between 9 am to 4:30 pm Monday to Friday) to get more information.



UC Invest is the trading name of Uniting Church SA Investment Fund Limited ACN 620 095 472 AFSL 501022 ('the Fund'), a public company limited by guarantee and registered under the Corporations Act 2001. The Fund exists for the charitable purpose of advancing religion by supporting the mission of the Uniting Church in Australia. The Fund is not prudentially supervised by the Australian Prudential Regulation Authority (APRA). Therefore, an investor in the Fund will not receive the benefit of the financial claims scheme or depositor protection provisions of the Banking Act 1959. Investments in the Fund are intended to be a means for investors to support the charitable purposes of the Fund. The Fund is required by law to advise investors that investments in it are only intended to attract investors whose primary purpose for making their investment is to support the charitable purposes of the Fund, that investors may be unable to get some or all of their money back when they expect or at all, that investments are not subject to the usual protections for investors under the Corporations Act 2001 or regulation by the Australian Securities and Investments Commission (ASIC), and that the investment is not comparable to investments with banks, finance companies or fund managers. The Fund holds an Australian Financial Services licence (AFSL) number 501022 authorising it to deal in, and provide general financial product advice in relation to, securities (which include debentures) and non-cash payment products. It also operates under an instrument made by ASIC the effect of which is to exempt it from the requirement to comply with Parts 6D.2 and 6D.3 of the Corporations Act 2001 in relation to offers to issue debentures (ASIC Corporations (Charitable Investment Fundraising) Instrument 2016/813). Our Charitable Investment Fundraiser Identification Statement provides more information and explains how investment funds are used to support the charitable purposes of the Fund.



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