



How BOBS' Corporate Investments Differ from the Retirement Investments

Did you know that BOBS has separate investment policy statements that govern corporate investments and retirement plan investments?

The investment policy statements for BOBS' corporate investments mirror the investment policy statements of the General Synod Council of the Reformed Church in America (RCA) and have specific social screening constraints that have been adopted by General Synod going back to 1985.

BOBS' corporate investment portfolios must seek to avoid investments in the securities of companies whose principal business involves the production or distribution of tobacco or alcohol, the business of gambling, the business of for-profit prisons, adult entertainment and pornography and firearms. The socially responsible investment guidelines for BOBS' corporate investments are not intended to be a "zero tolerance" policy and the determination, implementation, and ongoing monitoring of these guidelines is a shared responsibility of the Investment Manager and the GSC Investment Advisory Committee.

However, as stated in the retirement fund investment policy statement, the social screening investment guidelines apply only to the BOBS' endowment and operating reserve investments and do not apply to the RCA Retirement Plan and RCA 403(b) Retirement Program assets. Except for the funds as part of the Fidelity BrokerageLink, the investment options in the retirement plans, including the Freedom Funds, are monitored by the GSC Investment Advisory Committee and BOBS' retirement consultant to ensure the objectives of the retirement fund policy statement are being achieved.

Through the [self-directed brokerage account](#) in the retirement plans (newly added early 2024), socially responsible investment options are available to participants who seek to invest in companies who are consistent with their personal values.