A New Way To Invest In Catholic Values

An Investment Adviser focused on Catholic Values


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WHITTIER, CA, UNITED STATES , April 30, 2017 /EINPresswire.com/ -- InvestingCatholic was founded by Catholic advisers in order to provide our clients with a new way to invest according to their Catholic Values. We provide Investment Management services to clients online through our custodian, Folio Investments Inc. With InvestingCatholic, our clients can open accounts online with no minimum investments, and we offer Investments that are consistent with Catholic moral values. Our fees are affordable, just 0.70% per year, or lower depending on the amount of assets managed. We serve our clients as a Fiduciary and are an SEC Registered Investment Adviser with a focus on providing our clients with diversified investment model portfolios “Folios” screened for Catholic values through our website www.investingcatholic.com. Our advisers carefully screen all investments for Catholic values as defined by the US Conference of Catholic Bishops (USCCB) Socially Responsible Investment Guidelines.

Many Catholics are aware that the church stands up for life and human dignity, but may be unaware of the Socially Responsible Investment Guidelines as defined by our Bishops. InvestingCatholic was founded to address this need, and to provide a viable solution to Catholics. We provide Catholics with sound investments from both a moral and financial perspective.

Who we serve
InvestingCatholic provides Investment Management services to individuals, families, small businesses, and non-profits which include religious organizations and parishes. Our clients enjoy access to many types of accounts including taxable, retirement, revocable trusts and business accounts. A full list of our account types can be found on our website at: http://investingcatholic.com/account-types/.

Easy Account Setup
InvestingCatholic makes it easy for our clients to invest in their values. Our clients start by clicking on the “Create Account” link at the top of our homepage and will be directed over to our custodian, Folio Investments Inc. Clients select the type of account that they want to open and proceed through the registration process. During account registration, our clients complete a risk tolerance questionnaire. Based upon their answers which measure the client’s time horizon for the investment and their risk tolerance they are assigned to one of our seven risk-based models, ranging from Defensive though Aggressive Growth. All clients will be subscribed to a model within one of our Catholic Values Indexed ETF Series.

Account Funding and Transfers
The entire account setup process is easy, and takes just minutes to complete. During account setup, our custodian provides our clients with a variety of account funding options including: ACH, Wire, Check or Transfer of Assets held at another broker. The online transfer of assets feature allows our clients to request transfers of cash and securities from another broker over to their new account with InvestingCatholic. Requesting a transfer online is easy and just takes a few minutes. Our advisers are available to help you during this process if you need assistance.

Portfolio Construction
InvestingCatholic believes that sound Catholic investments are based upon portfolio quality, not just screening for Catholic values. When building our portfolios, we start with our security selection process. The first step we take is that we apply our proprietary Catholic values screening technique to potential investments. After the screening process is completed, and securities have passed this first test, we analyze each portfolio security carefully using fundamental analysis to assess the strength of the investment. Once the securities pass this second phase we move on to Portfolio Construction. We use the principles of Modern Portfolio Theory during the Portfolio Construction phase and apply the principles of asset allocation to determine the appropriate weighting of securities within the portfolio. Each one of our portfolios is constructed according to one of our seven risk profiles; Defensive, Conservative, Moderately Conservative, Balanced, Moderate Growth, Growth and Aggressive Growth.

Our Portfolio Series
Our Catholic Values Indexed ETF Series and our Catholic Values Indexed ETF “R” Retirement Series are made to address the needs of both taxable and retirement accounts respectively. Built using low-cost Indexed ETF’s, the securities within these Portfolios are designed to track a variety of benchmarks within both the stock and bond markets and are considered passively managed investments. Clients are automatically subscribed to one of our Catholic Values Indexed ETF models when they setup an account.

The third Series we offer is our Ave Maria Mutual Fund Series is built for the needs of both taxable and retirement account alike. Ave Maria, the leading Catholic Mutual fund family offers actively managed Catholic Values mutual funds. Clients may request to add the Ave Maria Series to their account anytime. For further information about our Portfolios, please visit our Portfolios page at http://investingcatholic.com/our-portfolios/.

Client Support
InvestingCatholic is an SEC Registered Investment Adviser pursuant to Section 203A-2(e) of the Advisers Act, we provide our investment advice to clients solely through an interactive website. InvestingCatholic does not provide personalized investment advice to clients at this time. We provide client support for general questions about your account and our services. We can be reached via email, chat, or by calling us toll-free.

We look forward to helping you to invest according to your Catholic values, please visit us at www.investingcatholic.com.

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