

Why the Southern Baptist Foundation?

Our Mission

To advance God's kingdom by providing financial services and encouraging Christian stewardship .

Our Vision

A transformed world as the consequence of believers integrating biblical stewardship into their financial lives.

Our Values

.....God owns everything. Psalms 24:1

And since God owns everything, we should put Him F.I.R.S.T.

.....Focus

Christ is the Center of all we do. Colossians 3:2

.....Integrity

Our Christian beliefs are an integral part of our investment strategies and actions.

2 Thessalonians 3:13

.....Respect

Every client deserves our respect. Luke 6:31

.....Service

We are called to make the most of our God given talents. Philippians 2:3-4

.....Trust

Our word is our bond. Proverbs 3:5-6

The Foundation employs a professional staff whose work is supported by a seven-member Board of Directors elected by the Southern Baptist Convention.

Members of the Foundation Board must be members of cooperating Baptist churches. They are selected on the basis of personal commitment, integrity, business ability and experience. Administrative, audit and investment policies are set by the Board.



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Find out more about Christian stewardship at mylegacyoffaith.org.



investing in the kingdom

Developing an estate plan can be the largest act of financial stewardship you will make in your life.




Who We Are

The Southern Baptist Foundation was established in 1947 to provide a wide range of investment and estate planning services for Southern Baptist Convention entities, institutions and individuals while supporting the Convention in its objective of spreading the gospel. While we are independent from the causes we serve, the Foundation is committed to assisting individuals and ministries in discerning God's Purposes for the resources He has entrusted to them, and maximizing the impact of the resources in estate and financial planning.

SBF Services for Individuals and Organizations

For individuals, the Foundation makes use of a full range of estate planning tools including out-right gifts, trusts, wills, gift annuities and donor advised funds. The Foundation provides prudent, socially-screened investment services to entities (organizations and ministries) of the Southern Baptist Convention. This includes full-service management of endowments, "foundations" and other investment instruments featuring complete tax accounting services. We provide maximum returns in ways consistent with our spiritual mandate.



Our role is not to convince you who to give to and which organizations to support; our role is to help you achieve God's best in the purposes He has laid on your heart.

Proven Trust

Since the 1940's, Southern Baptists have looked to the Foundation for trustworthy counsel in charitable giving. We strive to achieve the highest standard of business "best practices," we are knowledgeable in all aspects of financial planning including tax legislation, and we are resourceful in maximizing your investments. We are committed to integrity so as to inspire your complete trust and confidence. Ours is a sacred trust. We endeavor to support you in discerning God's leading in the use of the resources He has entrusted to you, and skillfully offer relevant counsel to achieve the most significant Kingdom impact. We attempt to accomplish all this for the lowest level of fees.

Most funds placed in the Foundation by individuals are done so to achieve specific ministry intent. Distinct records maintain the integrity of each gift and, at any time, a donor can confirm their desired intentions are being honored.

The Foundation is a proud member of the Evangelical Council for Financial Accountability—an accreditation agency dedicated to helping ministries reach the public's trust through adherence to the utmost standards, Christian ethics and stewardship.

The Foundation's financial statements are consistent with generally accepted accounting principles. We obtain an annual audit from an independent third party. Copies of this audit are available upon request.

Helping build a Christian Legacy

For you as an individual, we stand ready to assist in discerning God's direction, providing counsel about the most effective planning techniques to achieve those goals, and to assist you in completion of those plans. For churches and other ministries, we offer full investment management service and the following outreach.

We encourage you to take advantage of the following services:

- ◆ Seminars on biblical stewardship, and estate or financial planning.
- ◆ Management of trusts, endowments, donor advised funds, scholarships, gift annuities and estates directed to Baptist and other Kingdom causes. This includes management of revocable trusts during a person's lifetime which feature ministry beneficiaries.
- ◆ Investment choices and strategies for churches and ministries.
- ◆ Estate planning, providing goals include ministries and Christian causes.
- ◆ Consulting churches and ministries in areas related to stewardship and strategic planning.

