



# Catholic Foundation of Southwest Iowa

## Thursday, September 12, 2024 Business Manager Forum

- **Investment opportunities**
  - Money Market-currently at 5.21%
    - Separate fund, easily accessed
- **Moving away from checks and to all ACH**-see form provided
- **Investment Policy Statement**-Do you need one? See CFSWIA provided
  - Assets with CFSWIA
  - Assets not with CFSWIA
- **Investment Time Horizon Guide**-See one pager provided
- **Funeral Planning Guide**
  - Electronic copies available online as well as a downloadable file.
  - One copy for each BM on back table
- **Constituent/parishioner data**
  - Why important for accuracy on emails and salutations?

### Questions? Please reach out to:

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