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## About Invest Catholic

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InvestCatholic.com is a service of Trinity Fiduciary Partners, LLC. Launched in 2008, InvestCatholic.com is a dynamic web portal that is emerging as the “go to” full-service financial portal for Catholics worldwide. On a daily basis, Invest Catholic will make available at no cost to anyone in the world with Internet access, fresh and informative content on business, finance and investment topics, as well as engaging and thought-provoking perspectives on Catholic faith and life. With over 65 million Catholics in the United States, Invest Catholic believes that the Catholic dollar can become a powerful voice for positive change. InvestCatholic.com’s mission is to provide socially responsible and faith-based content that delivers relevant and practical tools to help Catholics understand the impact their financial decisions have on the culture and the well-being of society. Through an internet platform that can potentially reach millions, InvestCatholic.com hopes to connect with people who desire a life authentically respectful of the Catholic faith and the principle, biblical teachings of Jesus Christ.

## About Trinity Fiduciary Partners, LLC

Trinity Fiduciary Partners, LLC, a registered investment advisor, specializes in helping Catholics and orthodox Christians express their faith through their investment activities.

It provides investment management to individuals, institutions, investment companies, and their advisors. In addition, it sponsors [www.investcatholic.com](http://www.investcatholic.com), the Faith & Family Advisors Network, and provides investment management to the Epiphany Catholic mutual fund family.



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## Spokespersons

### Letter to the Editor

Adam Auten

### About Invest Catholic

Adam is the Portfolio Manager of the Epiphany Faith and Family Values 100 Fund and Chief Investment Officer of Trinity Fiduciary Partners, LLC (Trinity). In addition to his investment management services to the Epiphany Fund, he is responsible for managing the Faith and Family Values 100 Index and applying Catholic social justice teaching to the evaluation of companies, beginning with the U.S. Conference of Catholic Bishops (USCCB) Socially Responsible Investment Guidelines. Adam has a B.B.A. in Finance from the University of Texas and an MBA in Finance from the University of Texas at Arlington. Prior to founding Trinity Fiduciary Partners, LLC, Adam spent 12 years as a financial officer with XTO Energy.

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Adam and Jennifer, his wife of twelve years, have two children and live in Arlington, Texas.

### Interview Questions

Sam Saladino

### Fact Sheet

Sam serves as the President of the Epiphany Faith and Family Values 100 Fund, a Catholic values mutual fund. He is also the Chief Executive Officer of Trinity Fiduciary Partners, LLC (Trinity). Sam is responsible for Trinity's strategic direction. In addition, he negotiates and manages relationships with other firms, partners, and investment consultants.

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Sam has a B.B.A. in Financial Planning and International Business from Baylor University-Waco, and is a CERTIFIED FINANCIAL PLANNER™.

Prior to 2005, Sam was a Senior Financial Advisor with American Express Financial Advisors for ten years. He also served as District Manager, recruiting advisors for the growing company, which he sold in 2004.

Sam and Cara, his wife of eleven years, have daughter, Tessa and a son, Jack. The family lives in Mansfield, Texas, where Sam is actively involved in his church, Legatus, Knights of Columbus, the Fort Worth Club and Rotary Club International.



## Interview Questions

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- 1) When did Trinity Fiduciary Partners form and what is its mission?
- 2) What are some of the products or services you provide?
- 3) What are some of the characteristics that Trinity Fiduciary looks at when evaluating a company for investment criteria?
- 4) There are other Catholic mutual funds available in the market, what made you decide to sponsor the Epiphany Fund?
- 5) Is there such a thing as a “Catholic” company? Does it have to have a Catholic CEO?
- 6) Do you make available a list of companies that Catholics should avoid?
- 7) If my money is currently invested in my company’s 401k plan, what can I do to influence how it is invested?
- 8) Are there guidelines that Trinity can refer to as a resource?
- 9) Why would the USCCB issue such a pastoral plan for Catholics?
- 10) What are some of the characteristics that companies possess that would cause Trinity to eliminate them when it comes to investing?
- 11) What is an Advisor Network?
- 12) What are the benefits of using an advisor when investing vs. screening out companies as an interested individual?
- 13) How do the services offered by Trinity differ from that of another investment company?
- 14) You’ve recently launched InvestCatholic.com. What do you hope to accomplish through this web site?
- 15) You’ve recently introduced a new fund option for investors. Can you explain what an Index Fund is and how the new Faith and Family 100 is chosen?
- 16) What is a mutual fund and what are the benefits of investing in one?
- 17) In his 1991 encyclical Centesimus Annus, Pope John Paul II said, “the decision to invest in one place rather than another, in one productive sector rather than another, is always a moral and cultural choice.” This is a pretty serious statement. Why do you think more Christians don’t recognize that they have a moral responsibility when it comes to investing?
- 18) What is the first step individuals should take when looking to invest?
- 19) Is there a way to find out which kind of companies/funds other companies invest in?



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- Trinity Fiduciary begins with the criteria set by the USCCB Guidelines for Socially Responsible Investment and adds other Catholic social justice teaching in order to evaluate companies for investment

- An advisory board of prominent Catholics provides input into the interpretation of Catholic social justice teachings in order to establish consistent, actionable criteria for evaluating companies for inclusion in Catholic investments

- Trinity Fiduciary screens organizations and asks the question, “Does this company promote life and dignity of each person, family, the common good, or does it undermine these things?”

- Catholic investing falls into the category of Socially Responsible Investing or SRI

- Average charitable giving for all Americans is 1.7% of income, while the average for Catholic Americans is 1.0%

- 8 out of every 10 investors in the US consider themselves religious

- 56% of investors say they consider personal ethical values in their investment decisions or would be inclined to do so

- From 2005-2007, SRI assets increased more than 18% while the broader universe of professionally managed assets increased less than 3%

- In 2007, \$2.71 trillion or 11% of the total assets under management in the U.S. were involved in socially responsible investing

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### Letter to the Editor

- The fastest growing subset of SRI funds is religious mutual funds, growing from less than \$500 million ten years ago, to over \$17 billion today

### About Invest Catholic

- The Faith and Family Values 100 Index (FFV 100) is a sector neutral, market cap weighted index made up of the 100 largest U.S. companies that meet the criteria based on Catholic social justice teachings developed by Trinity Fiduciary

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- The goal of the FFV 100 is to produce investment returns that generally correspond to the S&P 500 Index, making it the “Catholic S&P 500”

### Interview Questions

- The vision of Trinity Fiduciary is to influence companies to consider not just shareholders, but anyone influenced, directly or indirectly, by their policies and actions

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- The Epiphany Faith and Family 100 Fund is an opportunity to live the faith more fully by planning for your future and influencing companies to be better corporate citizens at the same time

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- Catholic investing is different than other investments because its goal is to have a social as well as economic return.
- Trinity’s process of evaluating corporations is unique in that they have an exclusion component that eliminates companies for specific activities AND a scorecard that assesses remaining companies based on their corporate policies and activities.
- Pope John Paul II said“...The decision to invest in one place rather than another, in one productive sector rather than another, is always a moral and cultural choice.” “Centesimus Annus”, 1991

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- Pope John Paul II declared: Profit is a regulator of the life of a business, but it is not the only one; other human and moral factors must also be considered, which, in the long term, are at least equally important for the life of a business. (Centesimus Annus #35)
- InvestCatholic.com is the only web portal of its kind offering business, finance and investment news and content led by Catholic teachings



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