



**Purpose:** We exist to empower Catholic parishes, schools, ministries and individuals to fulfill their divine stewardship calling and sustain a vibrant mission of faith, hope, and charity within the Diocese of Winona-Rochester.



### Integrity

We are committed to faithfully and ethically serving the needs of the people and parishes throughout the Diocese of Winona-Rochester (DOWR). We take our stewardship responsibilities seriously, ensuring that we collaborate with and support the DOWR while maintaining clear legal distinctions to safeguard our donors and funds.



### Expertise

We are a trusted resource for the people and organizations within the Diocese of Winona-Rochester (DOWR). We provide education, consultation, and execution of investment, stewardship and development programs, enabling them to access these essential services without the need to hire or possess all of these skill sets locally.



### Mission-Focused

We are dedicated to stewarding the intentions of our donors and fund advisors, helping them create the lasting legacy and impact they envision. We adhere to Catholic Responsible Investing (CRI) principles in compliance with the USCCB, ensuring that our investment practices align with our faith. We thoughtfully distribute funds in accordance with our donors' wishes.



### Accountability

By partnering with us, you are choosing to invest in funds with a track record of proven returns spanning nearly 25 years. Our easy-to-access monthly statements and helpful customer service provide clear visibility into your returns, ensuring you are always informed and confident in your investment decisions.

**Contact Us for help with planned giving & wills, to invest your Catholic organization's funds or to learn about low-cost fundraising help.**

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