



## COVENANT TRUST COMPANY

### WHAT IS YOUR VISION?

Covenant Trust Company has proven that values-driven financial decisions are wise investments. For more than 30 years, we have provided comprehensive legacy planning and financial management resources to all of our clients.

### WHAT KEY ACCOMPLISHMENTS DID YOU ACHIEVE IN THE PAST YEAR?

Our assets under management have grown each year. We now have more than \$2 billion under our care. Those investments have been guided by biblical values that include understanding that money is just a tool provided by God that we steward.

But managing money can be frightening to many people and is often a source of shame when they fall into debt or are unable to provide as they would like for others. Our goal is to remove that shame and lead them to financial wellness, which impacts every aspect of their lives. One of the most important things we do is remind people of God’s grace and help them rewrite their story.

Debt can be a significant burden for ministers and seminary students, so we have partnered with North Park Theological Seminary to provide coaching as students prepare to graduate and move to a local church. This will enable them to lay the groundwork for making successful financial decisions. We have done this through individual coaching as well as through Jump Start weekends where we explore biblical and personal values. We help people turn their values into verbs, which is their purpose and mission. We don’t start talking about financial plans until after those discussions because the plans will work only if they are framed by values.

Our financial service representatives have led seminars with churches and other groups that are built on the same ideas as the Jump Start weekends. Our churches are having conversations they have never had before.

### WHAT ARE YOUR GOALS FOR THE COMING YEAR?

In the coming year, we plan to begin offering Jump Start weekends for churches as well as expand the number of seminars.

We are grateful for the stories of the newfound shalom people are experiencing. And we are grateful for the people who have chosen to invest through us and whose generosity has advanced the spread of God’s good news throughout the world.



COVENANT TRUST COMPANY®

**ANN WIESBROCK CFP®**



*President of Covenant Trust Company*

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