



The Evangelical Covenant Church

Report from Covenant Trust Company

AGENDA ITEM #31



**COVENANT
TRUST**

Gather 2024

THE 138TH COVENANT ANNUAL MEETING



**The brand of laptop that Michael Dell,
the founder and largest shareholder of
Dell Computer, uses is a ____?**

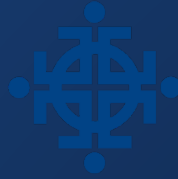


The brand of laptop that Michael Dell, the founder and largest shareholder of Dell Computer, uses is a _____?

DELL



Elon Musk, CEO and largest shareholder of Tesla, is most often seen driving what brand of car?



**Elon Musk, CEO and largest shareholder
of Tesla, is most often seen driving
what brand of car?**

TESLA



**The Evangelical Covenant Church
owns an investment firm called
Covenant Trust Company. Covenanters
entrust their investment and financial
planning needs to what company?**



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owns an investment firm called
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planning needs to what company?**

???



You Own a Trust Company!

- Founded on July 1, 1978, as the “Office of Planned Giving”
- Became an Illinois Chartered Trust Company on October 24, 1988
- Three owners: ECC, CMB, and NPU
- 41 employees; located in the Chicago Board of Trade in downtown Chicago



What We Do



**Investment
Management**



**IRA
Management**



**Trustee
Services**



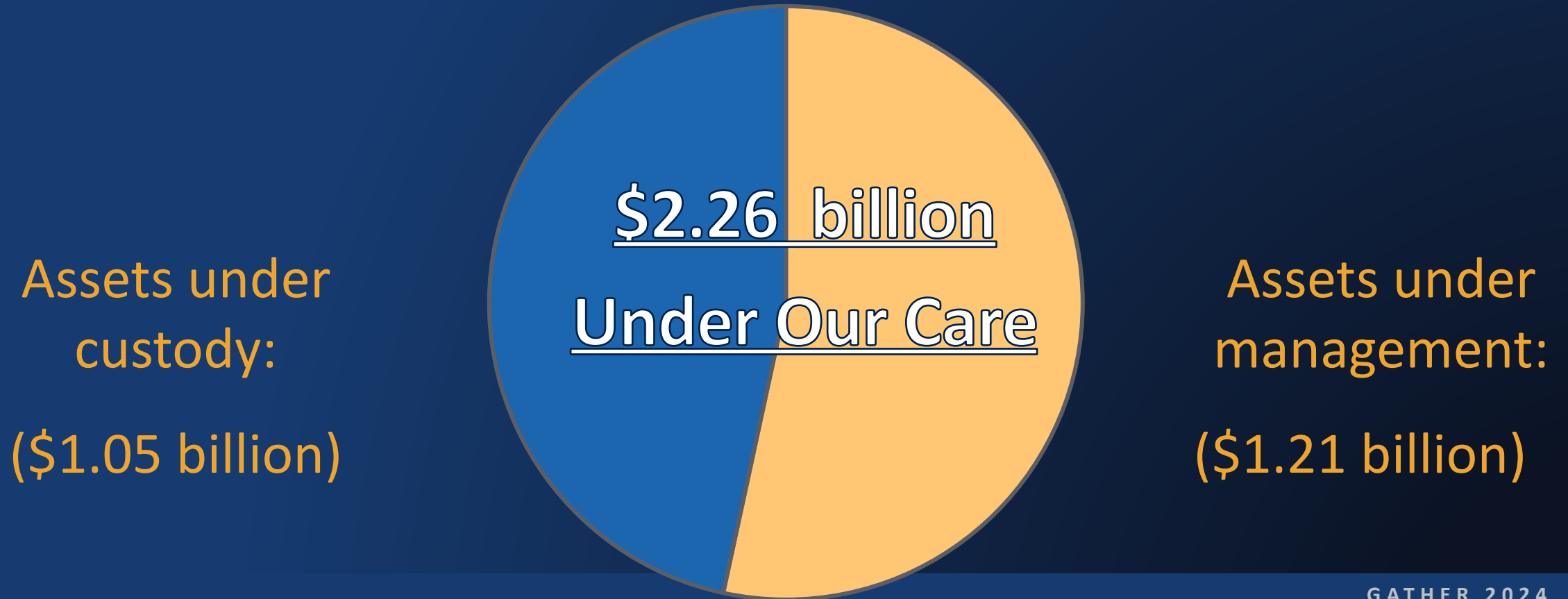
**Estate
Planning**



**Gift
Planning***

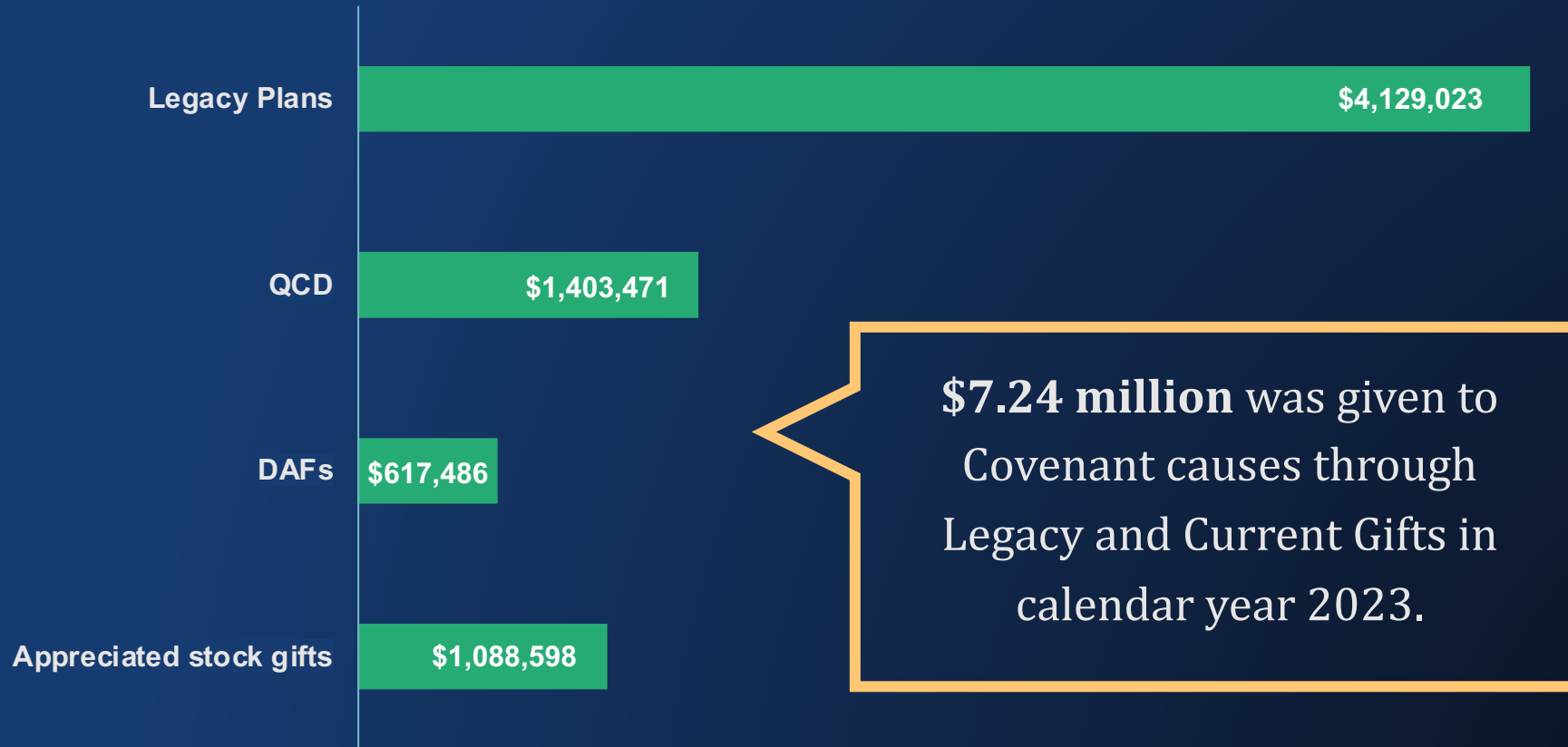
Assets Under Care

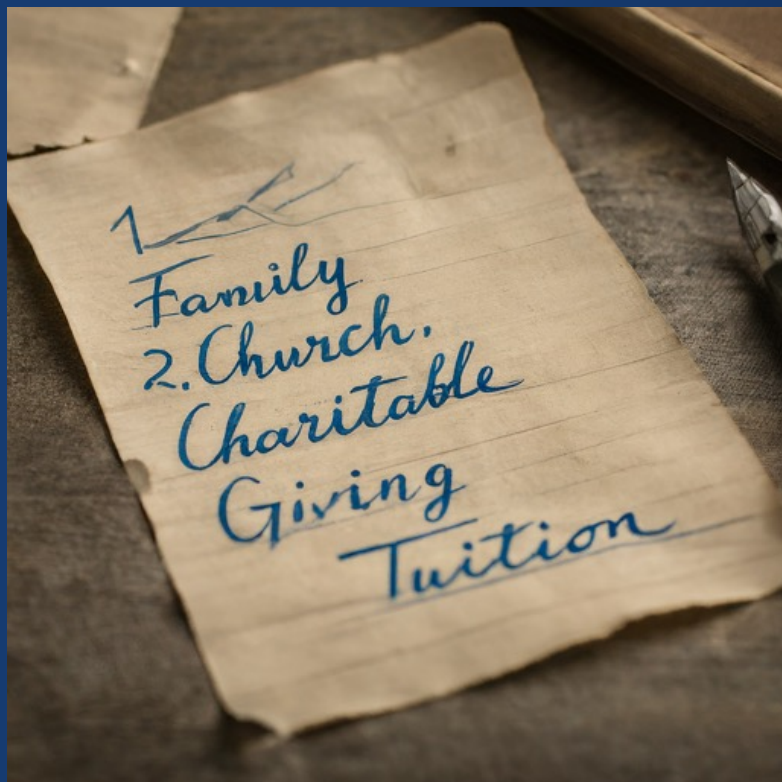
As of March 31, 2024



Charitable Giving to Covenant Entities

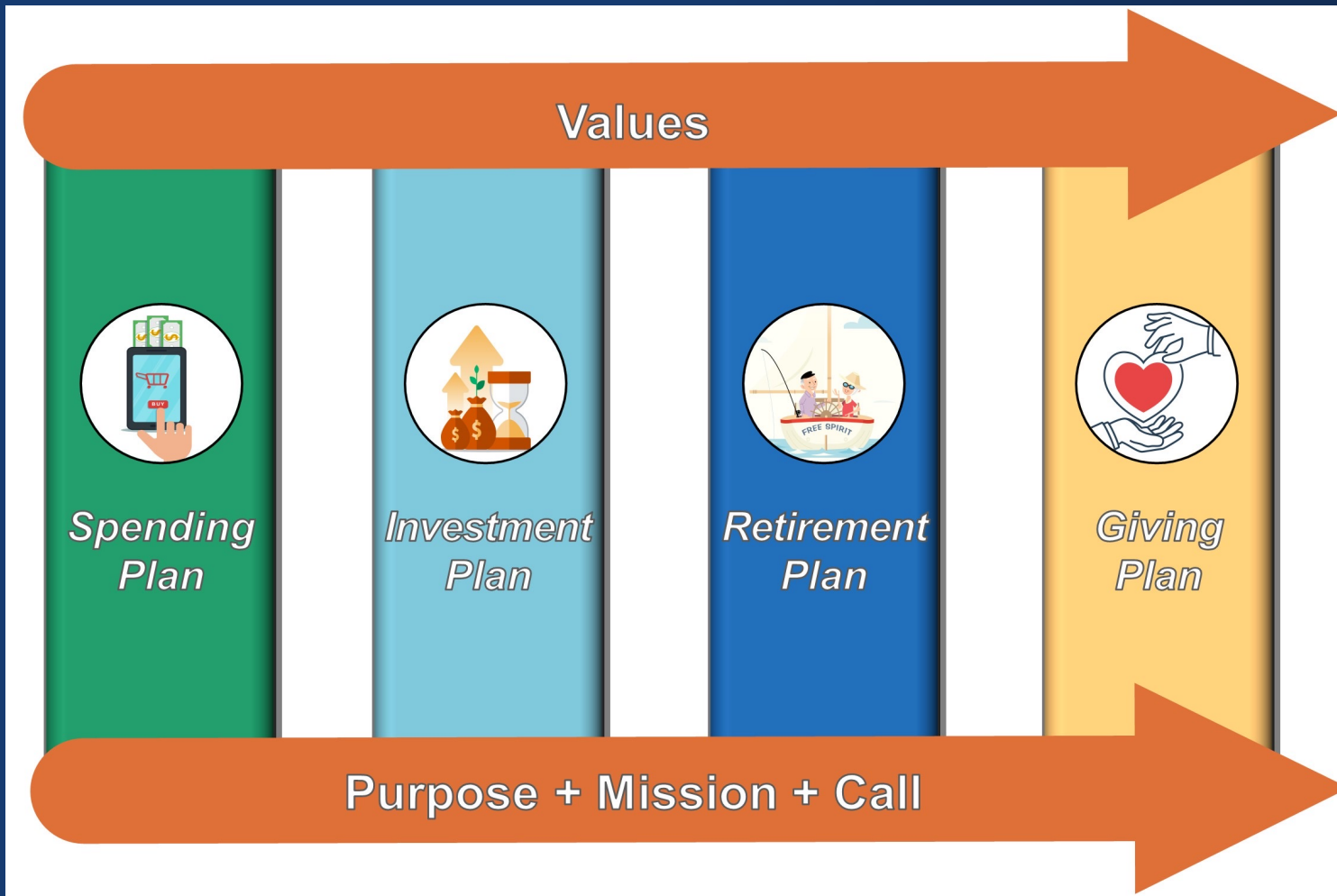
Calendar Year 2023





**What is most
important to
you?**

Do Your Financial Strategies Reflect and Protect Those Things Most Important to You?



At Covenant Trust, we help our clients to develop a plan aimed at achieving their financial and charitable purposes. We work to ensure that their financial strategies reflect and protect those things most dear to them..

Your Purpose Is Our Purpose

Purpose

Our purpose is helping to fulfill your purpose. Our work is centered around you.

Trust

We are fiduciaries, bound by law to put your needs and best interests above our own, always.



**COVENANT
TRUST**

Performance

We deliver competitive investment performance year after year on portfolios tailored to client values and goals.

Generosity

We want to be your partner, helping you provide well for yourself, your community, and the world around you.



Thank You!



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TRUST**