

FAITH
DRI > EN
INVESTING

Foundation Group

DISCUSSION GUIDE

This guide is intended for personal reflection and to help facilitate a meaningful group discussion. Take a moment to watch the video and read over the guide before your group meeting. Be prepared with some personal examples.

General Group Outline

Your group will be unique given the background and type of investors involved. However, the outline below can give you a rough idea of how the time in the group might flow.

ACTION	FOCUS	ESTIMATED TIME
Welcome	<p>QUESTION: Initial Introductions</p> <ul style="list-style-type: none"> • Who Are You • What brought you to this group • What are you excited about for the next 9 weeks together 	5 mins
Video Session	<p>INTRODUCTION (Related to content): Exploring our true identity can be difficult. We may not like what we find, but what we find is that God uses our brokenness to make us stronger.</p>	15-20 mins
Group Discussion	<p>As investors who push to see the graph move up and to the right, exploring our true identity can be difficult.</p> <p>Ask each person to share and incorporate any learnings from the video. Here are a few questions to get you started:</p> <ul style="list-style-type: none"> • Discussion Questions 	20 mins
(Optional) Business Spotlight	<p>One individual presents information on their investment story.</p> <ul style="list-style-type: none"> • One person shares about their journey with money and investing • Participants ask questions and get to know more 	10 mins
Prayer	<p>The group wraps in a time of prayer and encouragement</p> <ul style="list-style-type: none"> • Popcorn prayer—Designate one person to begin the prayer and another person to end the prayer. Then allow space and moments of silence for people to pray as they feel led. • Zoom rooms or small groups for prayer 	10 mins

Who Do You Think You Are?

IDENTIFIED IN CHRIST

As Christians, we seek to make God a part of every one of our decisions. The way we parent, lead, serve, and spend. We can do the same with our investments.

Money is put into our hands to steward wisely—for His glory and for the flourishing of the people around us. Financial resources when faithfully stewarded can act as the hands and feet of God's church working in the modern world.

We had the honor of having Pastor Tim Keller speak at one of our global conferences years ago ... When he was there, speaking to a room of investors, he said "rejoice not that you have a 10, 20, 30% return ... rejoice that your name is written on the book of the Lamb."

Do we believe that? Do we agree that this is our true identity?

If so, let that truth sink in deep. The more it informs our direction and decisions, the more genuinely we can respond out of gratitude and joy—and it's that peace that will allow us to enjoy the work of stewarding the capital that God has entrusted us with.

We often say that every investment makes an impact. And we quickly follow that up with the question, "What's yours?" Have you thought to ask what your impact is?

One of the gifts God has given us is choice. We get to choose where we live. How we spend. How we give. How we learn. What about choosing where we invest? Before we get there, we first need to build a strong foundation of understanding of who we are. And even more importantly, who we are in the eyes of God.



GUIDING INSPIRATION:

"You've got to make sure your identity is solidly rooted in Christ, not in having money or being successful." —Tim Keller

Discussion Questions

In this session, Pastor Tim Keller teaches how we keep God at the center of it all. But sometimes that is easier said than done. Here are a few more questions to help your group go even deeper in discussion.

- **Is it right that we feel better about ourselves based on our investment performance for the day? Do your friends, family, and loved ones know how a portfolio is performing based on how you walk in the door?**
- **Are there times that you feel that if you don't get great investment results that it will mean less money for needed work in the Kingdom of God? How does that hit you?**
- **In what ways does your performance as an investor get confused with your identity as a beloved child of God?**

3 Ideas to Explore the Mark Further

There's no limit to the ways you can explore the Marks of a Faith Driven Investor. What we provide below are five ideas we think might lead each one of us to an even greater understanding of our identity in Christ.

1. **Consider:** During today's video session, Henry challenged you to determine what the impact of your investments will be. Not merely the rate of return but what is the kingdom impact the capital you steward will have on earth?. Are you ready? What's holding you back? How can you ensure your identity in Christ anchors you more than the performance of your investments?
2. **Act Differently:** Reflect on your identity in Christ through [the Faith Driven Investing Bible devotionals](#) on the YouVersion Bible App and dive into these principles further in the [Faith Driven Investing book](#).
3. **Learn From Others:** Visit faithdriveninvestor.org to learn more or join the conversation by listening to our weekly [Faith Driven Investor Podcast](#).

The financial resources entrusted to us by God are not ours alone. It's all his. And every investment we make has an impact. So we should begin by asking God how He wants us to use capital to further his mission...not ours. You're sitting next to a group of like-minded

investors right now. One of the best ways to grow the Faith Driven Movement is to multiply your group.

Is someone in your group ready to raise his or her hand to start a Faith Driven Investing Group at a local church? Apply at faithdriveninvestor.org/lead-a-group

This guide is intended for personal reflection and to help facilitate a meaningful group discussion. Take a moment to watch the video and read over the guide before your group meeting. Be prepared with some personal examples.

Servant of One Master

GOD, MONEY, AND HUMANITY

As financial professionals in this industry—or investors and entrepreneurs going through this study—we're in the business of increasing wealth and it can be easy to lose sight of the bigger purpose.

We see the influence of capital on the markets and on the lives of those around us.

We're surrounded by the world's temptations. And these temptations can easily pull us away from pursuing our purpose and stewarding well the capital that God entrusts to us. And, if we're not careful, it could be easy to buy into the lie that we can serve both God and Mammon. And this duplicity becomes pervasive in how we act.

The truth is, we can't serve both. This is something we must get control of early.

As investors, we work with money every day. If we don't fully embrace our true identity in Christ and understand the temptations of Mammon, we cannot be successful. So much of this starts with a heart posture of knowing we are God's and it is his resources we are stewarding—nothing is ours.

Chasing after money, possessions, and status is a hollow pursuit. We may gain the fleeting pleasures of this world, but we lose out on the promise of eternity. We also lose out on the true happiness that God offers in this life when we follow his commandments.

How do we keep ourselves accountable? How do we see our blind spots? It starts with us knowing our true identity in Christ ... And it continues with us making sure we have a place where we can be radically vulnerable with friends.



GUIDING INSPIRATION::

"Can we live in this world where Mammon rules in a totally different way ... so all of our work as investors, spenders, savers, and givers is devoted to God and God's ways?" —Andy Crouch

Discussion Questions

In this week's video, best-selling author Andy Crouch shares a powerful teaching that transforms our understanding of money and how we can devote ourselves fully to serving God. Here are a few more questions to help your group go even deeper in discussion.

- **Does money influence our lives more than envy, lust, and pride?**
- **Why is there such secrecy when it comes to money? Why is it so radical to have someone outside of an advisor look into your finances?**
- **When was the last time a trusted friend pushed back and asked you the tough questions about God owning it all?**
- **How do we really challenge the idea directly about God owning it all? Is God really the majority shareholder of your portfolio or minority?**

3 Ideas to Explore the Mark Further

There's no limit to the ways you can explore the Marks of a Faith Driven Investor. What we provide below are five ideas we think might lead each one of us to an even greater understanding of what it means to be the servant of one master..

1. **Consider:** Be honest with yourself and determine the hold money has on you and your life. A generous heart is what helps to keep us free from greed, control, and selfishness. Do you agree? We tend to focus on finances when we think about generosity. What are some other ways we can give beyond just our treasure?
2. **Act Differently:** Invite your spouse and family members to join you in a free online [Journey of Generosity \(JOG\)](#) retreat hosted by [Generous Giving](#) (for US audiences) or [Generosity Path](#) (for non-US audiences) where you'll have a safe space to process your relationship with money and generosity.
3. **Learn From Others:** Visit faithdriveninvestor.org to learn more or join the conversation by listening to our weekly [Faith Driven Investor Podcast](#).

We are a global movement dedicated to gathering one million Christ-following investors and equipping them so they can make an impact with the capital they steward. Currently, thousands of Faith Driven Investors from more than 88 different countries are involved in groups like this. More are signing up every day.

Is someone in your group ready to help this movement continue to grow? They can apply to lead a Faith Driven Investing Group today: faithdriveninvestor.org/lead-a-group

This guide is intended for personal reflection and to help facilitate a meaningful group discussion. Take a moment to watch the video and read over the guide before your group meeting. Be prepared with some personal examples.

Capital = Influence

AWARE OF THE POWER OF MONEY AND MARKETS

Scholars believe Ancient Egypt is one of the six earliest cradles of civilization in the Old World.

Ancient Egypt grew independent of other civilizations in other locations. And trade was instrumental to this growth.

Throughout the old world and new, history has been shaped by the exchange of money, goods, and services. Even in Scripture, we see trade and commerce serving as a backdrop to much of what we understand about God and his people.

Trade equaled influence. And to this day, capital drives progress, innovation, and opportunity.

Those who own the capital possess the ability to influence their individual companies and the clients they serve. Money can impact the broader financial market as well.

The question for any Faith Driven Investor is this, "How will we use this power?"

In other words, capital equals influence. Throughout history, we've witnessed economic might winning wars, drawing borders, and even driving culture. Are you ready or even willing to accept the responsibility of this influence?



GUIDING INSPIRATION:

"If you really want to change the world, then you have to be able to change institutions. And who better to do that than Faith Driven Investors?"

—Dr. Finny Kuruvilla

Discussion Questions

We're responsible for leveraging the power generated by the force of investing. But investing for the common good will only succeed if Faith Driven Investors recognize and accept the invitation to participate in the fruits as well as become an agent of change. Here are a few more questions to help your group go even deeper in discussion.

- **Finny Kuruvilla talked about how the Western World could be speaking other languages if Columbus had secured different investors. How are investors still shaping our daily life?**
- **As with the Spanish investors who provided Columbus with capital to go overseas, how are you pursuing the opportunity to do the same? What do you think about shaping the cultural influence (or the language) being spoken in these foreign markets?**
- **What language are the people we are investing in going to speak? Will our community and the world be any different because our money is there?**

3 Ideas to Explore the Mark Further

There's no limit to the ways you can explore the Marks of a Faith Driven Investor. What we provide below are five ideas we think might lead each one of us to an even greater understanding of our God-given call to create.

1. **Consider:** Money talks. And it wields great power and influence in the world. The question for any Faith Driven Investor is this: How will we use this power? Where is your capital having influence already? And where would you like to see it have more influence?
2. **Act Differently:** Review your investment holdings and reflect on how the companies do or don't align with your faith. Learn more about the faith driven [negative and positive-screened mutual funds and ETFs](#) like [Eventide](#) that exist in the faith driven ecosystem.
3. **Learn From Others:** Visit faithdriveninvestor.org to learn more or join the conversation by listening to our weekly [Faith Driven Investor Podcast](#).

The financial resources entrusted to us by God are not ours alone. It's all his. And every investment we make has an impact. So we should begin by asking God how He wants us to use capital to further his mission...not ours. You're sitting next to a group of like-minded

investors right now. One of the best ways to grow the Faith Driven Movement is to multiply your group.

Is someone in your group ready to raise his or her hand to start a Faith Driven Investing Group at a local church? Apply at faithdriveninvestor.org/lead-a-group

This guide is intended for personal reflection and to help facilitate a meaningful group discussion. Take a moment to watch the video and read over the guide before your group meeting. Be prepared with some personal examples.

All Investing is Impact Investing

PULL FROM ONE POCKET

We understand God owns it all and that our capital has the power to make an impact. We understand that we are here on this earth for a short time. And yet, we need to be clear about our true purpose.

"It's not about you."

That's the very first sentence Pastor Rick Warren writes in his best-selling book "Purpose Driven Life".

He goes on to explain how the quest for personal fulfillment, satisfaction, and meaning can only be found in understanding and doing what God placed you on Earth to do.

This ultimate purpose is not about ourselves. It's not to bring fame to our own name. It's not to trumpet our own success and achievements.

We are here to glorify another.

That applies to our family, our neighborhoods, our business. But do we appreciate that all investing has some impact? What if we were to look at this part of our lives with more intentionality and seek to conform it more to the heart of God?

How do we become more intentional about our investing? What does this look like?



GUIDING INSPIRATION:

"All investing is impact investing. The sooner we embrace this incredible truth the sooner we can get off the sidelines and start making a real difference with the resources God has entrusted to us." —John Coleman

Discussion Questions

In this session, John talked about starting with an awareness—we first need to understand what is happening in our investments. Oftentimes we unwittingly invest or take ownership in ventures and funds that are contrary to our values. Here are a few more questions to help your group go even deeper in discussion.

- **All investing is impact investing ... Do we really believe that it is part of our portfolio or all of it?**
- **The headlines are filled with corporations influencing culture with their internal policies and public stances. How are investors shaping these positions? Can managed assets really have an impact?**
- **Is ESG bad? Does some of it align with our hopes for Faith Driven Investing? Where has it gotten off course? Where can we learn from ESG practices?**
- **What can we learn from the methodology of Jewish and Muslim investment philosophies that have brought faith into their investment policies? Can your faith be a competitive advantage?**

3 Ideas to Explore the Mark Further

There's no limit to the ways you can explore the Marks of a Faith Driven Investor. What we provide below are five ideas we think might lead each one of us to an even greater understanding of our God-given call to create.

1. **Consider:** Do you truly believe that it's all God's anyway? What that means for Faith Driven Investors is that we can stop dividing where we allocate capital and start multiplying the impact we have on the marketplace and the world. What does this look like for you? Faith Driven Investors use the influence of capital to make products and services, to create company cultures that support and empower employees, to launch faith-based employee resource groups, advocate for chaplaincy ... the list goes on.
2. **Act Differently:** Discover more about the extensive faith driven investing space through the Faith Driven Investor [podcast](#), including hearing more from Jon on the [Marks of the Markets podcast series](#).
3. **Learn From Others:** Visit faithdriveninvestor.org to learn more or join the conversation by listening to our weekly [Faith Driven Investor Podcast](#).

We are a global movement dedicated to gathering one million Christ-following investors and equipping them so they can make an impact with the capital they steward. Currently, thousands of Faith Driven Investors from more than 88 different countries are involved in groups like this. More are signing up every day.

Is someone in your group ready to help this movement continue to grow? They can apply to lead a Faith Driven Investing Group today: faithdriveninvestor.org/lead-a-group

This guide is intended for personal reflection and to help facilitate a meaningful group discussion. Take a moment to watch the video and read over the guide before your group meeting. Be prepared with some personal examples.

Redefining Return

PURSUING PEOPLE BEFORE PROFITS

The U.N. estimates that we will need \$2-3 trillion per year to solve some of our major social issues like hunger, poverty, education, and health care.

It seems almost insurmountable, especially as we work to realize a positive return on our investments. How can we support viable businesses while also tackling these big social challenges that loom large before us?

Giving is good—very very good—but philanthropy won't solve all, or even most of the challenges the world is experiencing. Giving has had its day. A more dynamic source of money is available.

Private capital provides access to a pool of funds that currently is in excess of \$100 trillion dollars and growing. To put that in perspective, that's more than 200x what is given philanthropically each year.

We need both investable and charitable capital to begin to attack our problems. They're better together.

As we tackle these we must look at return from more than a singular bottom line. We can only begin to tackle these things together through the power of compounding impact Not just financially, but also looking at the social, spiritual and generational changes that can happen.



GUIDING INSPIRATION:

"Grants won't solve our social issues going forward. So as Christians, if we don't invest in Spirit-led companies or investments, who will?" —Greg Lernihan

Discussion Questions

Spirit-led investing and patient capital can absolutely transform the future of your city or community. We need both investable and charitable capital to begin to attack our problems. They're better together. Here are a few more questions to help your group go even deeper in discussion.

- **The world is fallen. The system is broken. What is our role as Faith Driven Investors to cure a society that is suffering?**
- **God wants us to be part of his solution, not the problem-solvers. Yet, so often as investors and entrepreneurs we're action oriented. How do we move forward dependent on his power rather than our own? How do we continually pray before we "go off to battle"?**
- **For so long we've pressured philanthropy to solve the world's greatest problems. Is it possible to sustainably solve issues like hunger, poverty, and homelessness through the marketplace? If so, how?**

3 Ideas to Explore the Mark Further

There's no limit to the ways you can explore the Marks of a Faith Driven Investor. What we provide below are five ideas we think might lead each one of us to an even greater understanding of our God-given call to create.

1. **Consider:** During today's video session, we were introduced to Movement Schools. In what ways can you find a similar path to impacting the community where you work and live? How can you begin to change the current reality in a way that transforms lives today and for generations to come? This week, determine how private capital and philanthropy can work best together. What ways can you bring these two streams of money together to support human flourishing? We can't outgive the major social issues humanity faces in this broken and fallen world. Philanthropy alone won't help us battle hunger, poverty, bloodshed, and disease. How can you take a leadership role in funding ways to solve the world's biggest problems?
2. **Act Differently:** Talk with your financial advisor about available faith driven investment opportunities (*hint: if they don't have much to offer, encourage them to add new options!*) and how they can fit into your investment portfolio. If you are looking for a Christian financial advisor, visit [Kingdom Advisors](#) to [find a Christian Certified Kingdom Advisor](#).

3. **Learn From Others:** Visit faithdriveninvestor.org to learn more or join the conversation by listening to our weekly [Faith Driven Investor Podcast](#).
-

The financial resources entrusted to us by God are not ours alone. It's all his. And every investment we make has an impact. So we should begin by asking God how He wants us to use capital to further his mission...not ours. You're sitting next to a group of like-minded investors right now. One of the best ways to grow the Faith Driven Movement is to multiply your group.

Is someone in your group ready to raise his or her hand to start a Faith Driven Investing Group at a local church? Apply at faithdriveninvestor.org/lead-a-group

This guide is intended for personal reflection and to help facilitate a meaningful group discussion. Take a moment to watch the video and read over the guide before your group meeting. Be prepared with some personal examples.

Get In the Game

GOD DIDN'T SAVE US TO SIDELINE US

God has put you in the starting lineup. He's called your number. This might be a new beginning for you. And our greatest hope is that this series helps you see that God has given you everything you need to join him in transforming the people and the world around us.

If you're feeling anxious or overwhelmed, that's normal. But you're ready. You've done the reps. And over the past sessions of this series, we've given you what you need to get started.

We've been reminded that our identity is found in Christ...not in our wins or losses.

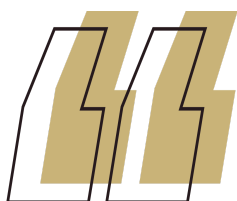
Andy Crouch helped us redefine our relationship with money through detox and creative resistance—we can push back against the temptations and trappings of this world.

Finny and John helped us see that it's not just our charitable capital that has an influence, but that every investment indeed has an impact.

And in this session, our friend David Platt said something that should shake you to your core:

"God didn't save us to sideline us."

He is calling us to so much more. God is a player's coach who is inviting us on a journey with him. Filled with joy and excitement unlike anything we could ever experience on our own. We're not on a quest to simply build a better portfolio. Or enjoy a higher rate of return. God is giving us the opportunity to know him more fully by allocating and deploying capital in a way that draws us closer to him and to his purpose.



GUIDING INSPIRATION:

"Is God your greatest ambition?." —David Platt

Discussion Questions

At this moment, it would be easy for us to get hyper-focused on the playbook of how to apply this content to our own context. But in doing so, we might miss the bigger picture. Faith Driven Investing is not some system we run to victory. Here are a few questions to help your group go even deeper in discussion.

- **Is God's glory our greatest ambition? What is competing for your devotion, attention, and worship?**
- **After everything we've learned in this series, what is the one thing that is still preventing you from getting in the game? How might you get off the sidelines and into Faith Driven Investing?**
- **We cannot do it alone. We need like-minded allies to help get off the sidelines. Who is that for you? Is it your spouse? A friend? Your advisor? How might you invite them into this pursuit with you?**

3 Ideas to Explore the Mark Further

There's no limit to the ways you can explore the Marks of a Faith Driven Investor. What we provide below are three ideas we think might lead each one of us to an even greater understanding of our God-given call to create.

1. **Consider:** We want to encourage you to participate in one of several communities where you can connect with like-minded peers who care about the things you do. These communities have already been built or are in the process of being created. And they're organized in three different ways: asset class; region; and solving some of the world's greatest problems. God has called you to impact the world with the resources he's entrusted to you. Joining a community that wants to Build, Invest, and Give together is your next bold step forward.
2. **Act Differently:** [Generous Giving](#)—for those in the U.S. and Canada—and [Generosity Path](#)—for those outside North America—provide immersive retreats for couples to decide how they might build a lifestyle of generosity.
3. **Learn From Others:** Visit faithdriveninvestor.org to learn more or join the conversation by listening to our weekly [Faith Driven Investor Podcast](#).

We are a global movement dedicated to gathering one million Christ-following investors and equipping them so they can make an impact with the capital they steward. Currently,

thousands of Faith Driven Investors from more than 88 different countries are involved in groups like this. More are signing up every day.

Is someone in your group ready to help this movement continue to grow? They can apply to lead a Faith Driven Investing Group today: faithdriveninvestor.org/lead-a-group