

# Financial Advisor's Report

June 2022

In these times of great uncertainty and change, I am more grateful than ever for our Unitarian Universalist Association. Our Association continues to side with love, justice, equity, peace, and the interdependence of beings and our planet. Our faith's commitment to dismantling systems of oppression in ourselves, our faith, and our world has never been more important. Our faith's work is supported by the generosity of time, talent, and financial resources of our members, congregations, and UU communities. This broad, solid foundation is essential to our spiritual wellbeing and our continued learning and development as a faith community committed to living our values.

Despite the many and distinct challenges of these past six years I have served as Financial Advisor, I am happy to say that our Association remains a vital force to side with love. The complex financial operations of our Association and congregations, health plan, retirement plan, publishing businesses, endowment and more, are sound. They support our faith's work in this world and in us. The staff and volunteers are thoughtful, prudent, wise, collaborative, and committed to the vision of our future as a beloved, multi-cultural, anti-oppressive community where all are valued and may thrive. I am grateful to have served alongside the caring, courageous, committed, focused, generous, and talented members of the UUA Board. I have learned a great deal from their wisdom and example.

I commend the leadership team of our Association, especially the Rev. Dr. Susan Frederick-Gray, Carey McDonald, Andrew McGeorge, and the Rev. Lauren Smith for their thoughtful focus on sustainable operations, structures, and programs. Their consideration for equitable, transparent transitions and the continued successful evolution of our faith are noteworthy and important to our values in this world.

I also commend the leadership team of Beacon Press, expertly led by Helene Atwan for decades, for the extraordinary financial results of the past several years. Beacon's powerful support for UU values, raising up the voices marginalized in our country and world and promoting peace, justice, and understanding, has achieved unprecedented success during the era of Covid. This success supports our faith's mission and strengthens both Beacon and the UUA for the future.

We all play a role in the spiritual and financial journey of our faith, whether locally or nationally, in our congregations, our community, through our actions, our generosity, our public witness, and service. Thank you for your generosity and for your commitment to see and be the change our world needs.

Please join me in thanking the gracious volunteers of our Audit Committee, our Investment & Socially Responsible Investment Committees (who have forged a path together and asked that the Board institutionalize their collaboration and commitment to the essential nature of the integration of our financial goals with our values), our Retirement Plan Committee, and our Health Plan Board (also known as the Employee Benefits Trust Board). I have learned so much from all of them and our faith has benefitted from their thoughtful and caring contributions.

I hope your faith and spirituality continue to grow and deepen. May you share your gifts in expected and unexpected ways and, in so doing, enrich the lives of others and yourself. Thank you for your support of our Unitarian Universalist values and for your commitment to living them in this world of need.