

PCJWG TimeLine

Finance Track

July 2025: Begin regular GHG footprint monitoring/reporting for UUCEF publicly traded holdings.

January 2026: Deliver ethics review and investment recommendation on nuclear energy.

June 2026: Develop rare/precious metals investment guidelines and review process.

GA 2027
Deliver report on measuring investment portfolio's Just Transition impacts.

Launch fossil-fuel free UU values domestic equity index fund.

Possibly propose a Statement of Conscience on nuclear energy.

Complete renewable energy investment offering implementation

2025

2026

2027

2028

2029

2030

Throughout 2025
Develop framework/tools for identifying GHG emissions sources in UUCEF holdings.

Initiate expanded fossil fuel (FF) divestment planning (beyond Carbon Underground 200).

Establish divested fund to provide discounted building loans for UU congregational climate justice projects.

Begin stakeholder consultations for banking/insurance sector criteria and engagement.

Start development of utility/finance/insurance sector evaluation and advocacy criteria.

End of 2026
Set expanded FF divestment goals and report on them.

Establish UUA Banks, Insurance, and Utilities Working Group.

Launch discussions on private equity/community/fixed income co-investment vehicles.

Throughout 2027
Encourage shareholder advocacy coordination across UU groups.

Strengthen cross-UU strategic working group for advocacy and community investment focus.

End of 2028
Deploy positive investment screens for "transition ready" / "Paris Aligned" companies.

Throughout 2029
Report on Community Investments and shareholder advocacy outcomes.

Reassess UUCEF manager alignment; adjust divestment and investment strategies as needed.

Prepare for reconstitution of the cross-UU strategic working group for 3-year review cycle.

Interim Target
Reach 50% GHG-neutrality of UUCEF per Paris-Based Targets.T

Reporting and monitoring of portfolio's carbon footprint.

Climate justice-oriented investment adjustments.

Advocacy and community investment impact assessments.

Continue screening of UUCEF commingled fund managers for climate values alignment.

Ongoing Commingled Fund conversions and replacements