



TSM Endowment Overview

*The SAVI Ministries Endowment Foundation
Institutional Stewardship Framework for Perpetual Mission Support*

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Internal Governance Document
Prepared for Institutional Leadership, Strategic Advisors, Fiduciary Partners,
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I. Purpose of the Endowment Foundation

The SAVI Ministries Endowment Foundation exists to provide a permanent capital base dedicated to sustaining the spiritual, humanitarian, and charitable mission of The SAVI Ministries across generations.

While operating contributions support the immediate work of the ministry, endowed contributions are entrusted to a long horizon stewardship framework designed to preserve and compound philanthropic capital so that it may continue supporting the institution's mission far into the future. The endowment therefore functions not merely as an investment portfolio but as a perpetual financial foundation upon which the ministry's long-term continuity depends.

The central objective of the Endowment Foundation is to ensure that philanthropic capital entrusted to the institution is governed, invested, and distributed with disciplined institutional stewardship. This requires balancing two responsibilities that must remain in constant equilibrium. The first responsibility is to provide sustainable financial support for the ministry's ongoing programs, humanitarian outreach, and charitable initiatives. The second responsibility is to preserve the real purchasing power and structural integrity of the endowed capital so that future generations may benefit from the same foundation of support.

The Endowment Foundation has therefore been structured around a governance architecture designed to protect the long horizon nature of philanthropic capital. Contributions to the endowment are invested under a formal Investment Policy Statement, supported by institutional oversight structures, and distributed under a disciplined spending framework that seeks to maintain both stability of mission support and durability of capital.

Through this framework, the Endowment Foundation serves as a permanent institutional resource whose purpose is to transform philanthropic generosity into enduring mission capacity. The goal is not simply to fund programs in the present but to ensure that the ministry's spiritual and humanitarian work can continue expanding its reach for decades and generations to come.

This approach reflects a fundamental stewardship principle. Institutions that aspire to serve across generations must treat philanthropic capital with the same seriousness that leading foundations, endowments, and long horizon investment institutions apply to their own permanent capital resources.

The SAVI Ministries Endowment Foundation has been created with that responsibility in mind.



II. Institutional Stewardship Philosophy

The stewardship philosophy governing The SAVI Ministries Endowment Foundation is grounded in the conviction that philanthropic capital entrusted to a mission driven institution carries both a financial responsibility and a moral obligation. The resources contributed by donors represent not only generosity in the present but also trust in the institution's ability to preserve and deploy that capital wisely in service of a lasting purpose.

For this reason, the Endowment Foundation approaches capital stewardship through a framework designed to protect the real value of endowed assets while enabling sustainable mission support across generations. The governing principle is that philanthropic capital must be managed with the same seriousness, discipline, and institutional rigor that characterize the world's most respected long horizon investment institutions.

This philosophy rejects the notion that endowments should be treated as passive pools of capital whose sole purpose is to generate short term funding for operational needs. Instead, the endowment is viewed as a permanent balance sheet whose first obligation is the preservation and compounding of real purchasing power. Only through disciplined stewardship of this capital base can the ministry ensure that its mission remains financially sustainable across changing economic environments.

The institutional architecture supporting the Endowment Foundation reflects this philosophy. Capital is governed under a formal Investment Policy Statement that defines strategic allocation principles, capital preservation safeguards, sovereign risk awareness, and disciplined portfolio oversight. These structures are reinforced by governance bodies responsible for monitoring adherence to the policy framework and ensuring that the stewardship of endowed capital remains aligned with the long-term interests of the institution.

Within this framework, the objective of investment management is not simply the pursuit of return but the preservation of institutional resilience. Portfolio decisions must therefore balance growth, liquidity, inflation protection, and risk management in a manner that protects the structural durability of the endowment.

By maintaining this disciplined approach, the Endowment Foundation seeks to transform philanthropic contributions into a permanent institutional resource capable of sustaining spiritual outreach, humanitarian service, and charitable impact across generations.

III. Governance Architecture

The stewardship of The SAVI Ministries Endowment Foundation is supported by a comprehensive governance architecture designed to ensure that endowed capital is managed with transparency, accountability, and long horizon institutional discipline.

The governance framework reflects the understanding that permanent philanthropic capital must be protected by clear structures of authority, defined oversight responsibilities, and disciplined operating procedures. These structures ensure that decisions affecting the endowment are made within a coherent institutional framework rather than through ad hoc or discretionary processes.



At the highest level of institutional stewardship, the Office of the Chairman serves as the ultimate guardian of the ministry's founding mission and the long-term integrity of the Endowment Foundation. The Chairman is responsible for safeguarding the alignment between the stewardship of endowed capital and the spiritual and humanitarian purpose of the institution.

Supporting this leadership role is the Board of Trustees, which provides experienced counsel, governance oversight, and fiduciary awareness in matters affecting the institutional stability of the ministry. The Board contributes perspective drawn from professional experience in fields relevant to the stewardship of philanthropic institutions, helping ensure that governance practices remain consistent with recognized standards of responsible oversight.

The Endowment Governance Committee provides specialized oversight of the investment governance framework supporting the endowment portfolio. This committee reviews adherence to the Investment Policy Statement, monitors portfolio stewardship practices, and helps ensure that the institutional discipline governing the endowment remains consistent with the long horizon preservation mandate of the Foundation.

Together, these governance bodies create a layered oversight structure that balances mission guardianship, fiduciary awareness, and investment governance. The purpose of this structure is not to complicate decision making but to reinforce the institutional discipline necessary to steward philanthropic capital responsibly across generations.

Through this governance architecture, the Endowment Foundation ensures that the generosity of its donors is protected by clear institutional accountability and a stewardship framework designed to preserve the ministry's mission capacity far into the future.

IV. Investment Governance Framework

The investment governance framework of The SAVI Ministries Endowment Foundation is designed to ensure that the stewardship of endowed capital is conducted with disciplined institutional oversight, long horizon strategic perspective, and rigorous adherence to clearly defined policy structures.

At the center of this framework is the Investment Policy Statement adopted by The SAVI Ministries. The IPS serves as the governing document for all portfolio management activities associated with the endowment. It defines the strategic asset allocation structure, capital preservation safeguards, sovereign exposure guidelines, liquidity management principles, and monitoring procedures that guide the long-term stewardship of the portfolio.

The IPS establishes the institutional rules under which capital may be deployed, monitored, and protected. Strategic allocation ranges define the broad structure of the portfolio, while disciplined risk management principles ensure that capital preservation remains a central priority. Within these policy boundaries, the portfolio is constructed with the objective of maintaining resilience across varying macroeconomic environments, including periods of inflationary pressure, financial instability, and geopolitical uncertainty.

The investment governance framework also incorporates a structured monitoring process designed to evaluate whether the portfolio continues to operate within the policy parameters established by the IPS.



Periodic reviews assess portfolio positioning, macroeconomic developments, and institutional risk indicators relevant to the long-term sustainability of the endowment.

Where external financial institutions, custodians, or investment advisors are engaged to assist in portfolio implementation, they operate strictly within the policy framework established by the IPS. Their role is to support the disciplined execution of the investment strategy rather than to alter the governing principles that define the stewardship of the endowment.

Through this framework, the Endowment Foundation ensures that investment decisions remain anchored to a coherent institutional architecture designed to preserve capital, support sustainable mission distributions, and protect the long-term financial strength of the ministry.

V. Endowment Distribution Framework

The Endowment Foundation provides financial support to the mission of The SAVI Ministries through a disciplined distribution framework designed to balance present mission needs with the long-term preservation of endowed capital.

Distributions from the endowment portfolio are governed by a formal spending policy that establishes the principles and procedures used to determine annual mission support. The objective of this framework is to provide stable and sustainable funding for the ministry's programs while maintaining the structural integrity and real purchasing power of the endowment over long time horizons.

Because financial markets experience cycles of expansion and contraction, the distribution framework incorporates smoothing mechanisms intended to moderate the effect of short-term market volatility on annual mission support. This approach helps ensure that ministry programs are not forced to expand or contract dramatically based on temporary fluctuations in portfolio value.

Annual distributions are generally determined as a percentage of the endowment's trailing average market value over a multi-year period. By relying on a trailing average rather than a single year valuation, the distribution process reflects the long horizon nature of the endowment and reduces the risk that withdrawals become excessive during market peaks or overly constrained during market downturns.

The spending framework is designed to support a sustainable balance between mission funding and capital preservation. During periods of significant market decline or economic stress, institutional leadership may elect to moderate distribution levels in order to protect the long-term resilience of the endowment portfolio. Conversely, during periods of strong market performance, disciplined spending practices help ensure that temporary asset appreciation does not lead to unsustainable long term funding commitments.

Through this structured distribution framework, the Endowment Foundation seeks to provide dependable financial support for the ministry's spiritual and humanitarian work while preserving the capital base necessary to sustain that mission across future generations.



VI. Philanthropic Partnership and Endowed Giving

The SAVI Ministries Endowment Foundation offers philanthropic partners the opportunity to participate in the long-term strengthening of an institution dedicated to spiritual outreach, humanitarian service, and charitable impact across the Americas and beyond.

Endowed contributions represent a form of philanthropic partnership that extends beyond immediate program support. Rather than being consumed in the present, endowed gifts become part of a permanent capital base whose investment income helps sustain the ministry's mission over extended time horizons. Through this structure, philanthropic generosity is transformed into a lasting institutional resource capable of supporting spiritual and humanitarian work across generations.

Donors who contribute to the Endowment Foundation participate in a stewardship framework designed to protect the integrity of their contributions. Capital entrusted to the endowment is governed under formal institutional policies, including the Investment Policy Statement, the endowment distribution framework, and the governance structures established to oversee the preservation and responsible deployment of endowed assets.

This framework reflects the ministry's commitment to treating philanthropic capital with the seriousness and discipline expected of long horizon institutional funds. Contributions to the endowment are not viewed simply as financial resources but as expressions of trust placed in the institution by those who believe in its mission and its capacity to steward resources responsibly.

The Endowment Foundation therefore seeks to cultivate philanthropic relationships grounded in transparency, mutual respect, and shared commitment to the ministry's spiritual and humanitarian purpose. Donors are invited to participate in the long-term strengthening of an institutional platform designed to expand the reach and continuity of the ministry's work for many years to come.

Through endowed giving, philanthropic partners help ensure that the mission of The SAVI Ministries continues to grow in strength, stability, and impact across future generations.

VII. Institutional Commitment to Stewardship and Accountability

The SAVI Ministries recognizes that the stewardship of philanthropic capital requires the highest standards of institutional integrity, financial discipline, and moral responsibility. Contributions entrusted to the Endowment Foundation are therefore governed under a framework designed to ensure that capital is managed with transparency, prudence, and unwavering respect for donor intent.

The ministry approaches the stewardship of endowed assets with the understanding that such resources represent a long-term trust placed in the institution by its philanthropic partners. This trust carries with it the obligation to preserve capital responsibly, to deploy resources in alignment with the ministry's mission, and to maintain governance structures capable of sustaining institutional continuity across generations.

To support this responsibility, the Endowment Foundation operates within a structured governance architecture that includes defined oversight bodies, formal investment governance policies, and disciplined distribution practices. These mechanisms are designed to ensure that the management of the endowment remains consistent with both the spiritual mission of the ministry and the institutional standards expected of long horizon philanthropic foundations.



Transparency forms a central component of this stewardship commitment. The ministry maintains clear documentation governing the management of the endowment portfolio, including the Investment Policy Statement and related governance instruments. These documents establish the framework within which endowed capital is preserved, invested, and distributed in support of the ministry's charitable work.

Institutional accountability is further reinforced through periodic reviews of the endowment's governance framework and investment posture. These reviews are intended to ensure that the endowment continues to operate within the policy structures established to safeguard the durability of philanthropic capital while maintaining its ability to support the ministry's programs.

Through this institutional commitment to stewardship and accountability, The SAVI Ministries seeks to honor the trust placed in the Endowment Foundation by its philanthropic partners and to ensure that their contributions continue serving the ministry's mission with integrity and discipline far into the future.