

FOR IMMEDIATE RELEASE

Foundations Learn to Invest More Money Where Missions Are

WHEATON, Ill. (May 1, 2007) – Donald Cummings, principal of Blue Haven Capital, will be among the featured speakers at the Association of Small Foundations’ Spring Conference, May 21-23, in New York City. Cummings will be talking about Mission Related Investing, a unique and powerful financial management strategy he maintains can increase a foundation’s impact in its given mission area 20-fold.

“If a foundation is able to grant out 5 percent of its portfolio and make a difference in a specific area, such as education, health care or human services, then it stands to reason that investing the remaining 95 percent of the portfolio in a similar direction can generate exponentially more impact and social change,” Cummings asserts. “By aligning asset investment with philanthropic mission, foundations can truly unlock the potential of the extensive capital resources they control.”

As the concept of Socially Responsible Investing (SRI) is attracting mainstream attention not only for its social and environmental impact, but also for its financial viability, Mission Related Investing (MRI) refines these principles to meet the needs of foundations. One of only a handful of independent money managers nationwide to specialize in SRI, Blue Haven Capital may well be the only firm of its type involved to any significant extent in MRI.

Blue Haven principals have systematically reclassified approximately 98 percent of the investable U.S. stock market into mission-related categories, then analyzed these stocks using a broad cross-section of research from Goldman Sachs, Schwab, Standard & Poor’s, Morningstar and other respected sources to identify the most highly

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recommended companies in each area. These stocks, combined with fixed income instruments such as mission-based CDs and taxable municipal bonds, make up the cornerstone of Blue Haven’s MRI portfolios in areas including Education, Human Services, Environment, and Health.

“The concept of investing assets in a direction compatible with a foundation’s mission seems intuitive,” says Cummings, “but it hasn’t been the norm. Without MRI-specific information and instruments, it’s often difficult for a foundation officer to assess the social impact of investments made. As we’ve seen in recent portfolio realignments by organizations as highly respected as the Gates Foundation, investments can sometimes even be in conflict with the stated mission of the foundation.

“Given the scope of the resources controlled by foundations in this country today, it’s exciting to think about MRI’s potential to profoundly impact environmental sustainability, community development, education, health equity, and many other causes.”

Blue Haven Capital is an independent, privately owned firm dedicated to helping clients achieve above average returns, while aligning investment choices with institutional or personal values and directives. Blue Haven Capital is located at 100 W. Roosevelt Rd., A4 Suite 103, in Wheaton, Ill. For additional information, log on to www.bluehavencapital.com or call 630-588-3800.