

A GUIDE FOR CLIENTS

How we screen your portfolio

Primary Mission Screening: a simple, Biblical approach to deciding what not to own, without pretending we can escape an interconnected world.

What if you invest the way you spend, to give the way you're called?

Prepared for you by

Primary Mission Screening is a free philosophy from Kingdom Mindset Investing. Advisors may use and share it freely with credit.

WHY IT MATTERS

You're already invested.

Investing isn't only what's in a brokerage account. Every day we invest our time, our talent, and our treasure. The phone in your pocket, the search engine you use, the bank that holds your paycheck, the card you swipe, the car you drive, the company you work for: most of our hours and most of our money already flow through companies we'd never pick on purpose.

So a portfolio screened for every possible sin, while our spending funds the same companies, isn't conviction. It's hypocrisy. Kingdom Mindset Investing teaches a balanced, consistent approach to investing time, talent, and treasure, reflective of Biblical beliefs, in an interconnected world.

TIME

Hours every day on screens, apps, and platforms run by a handful of companies.

TALENT

Roughly 90,000 hours of a lifetime spent at work, building someone's business.

TREASURE

Nearly every dollar earned flows through banks, card networks, automakers, and retailers.

Our mission is not to eliminate investing in an interconnected world, but rather, to be active stewards of our God-given time, talent, and treasure as we seek to advance the Gospel of Jesus.

ONE

Embrace reality

We can't separate from every company that does wrong, and man-made rules don't make us holy. Draw a clear, honest line.

"These have indeed an appearance of wisdom in promoting self-made religion and asceticism and severity to the body, but they are of no value in stopping the indulgence of the flesh."
Colossians 2:23 (ESV)

TWO

Steward actively

What God entrusts to us is meant to be put to work, not buried.

"He who had received the five talents went at once and traded with them, and he made five talents more."
Matthew 25:16 (ESV)

THREE

Give generously

Everything belongs to Him. Good stewardship flows outward to advance the Gospel.

"Whoever sows bountifully will also reap bountifully... for God loves a cheerful giver." 2
Corinthians 9:6-7 (ESV)

HOW IT'S APPLIED

Primary Mission Screening

We apply this to the stocks and funds we recommend for you. A company is removed if its primary mission is one of three things:

Abortion manufacturing

Pornography production

Gambling

For each company, ask one question: is this the reason the company exists?

If yes, it's removed. If the tie is minor or incidental, it's kept, and the reason is written down.

Marriott

Its primary mission is to be a hotel chain. It also has some gambling facilities.

KEEP · INCIDENTAL TIE

MGM Resorts

Its primary mission is to be a gambling company. It also has hotels.

REMOVE · PRIMARY MISSION

Disney

Its primary mission is entertainment. Its ESPN network has an official sportsbook partner.

KEEP · INCIDENTAL TIE

DraftKings

Its primary mission is sports betting and online gaming.

REMOVE · PRIMARY MISSION

WHAT YOU CAN EXPECT FROM US

01

We flag

Your holdings are checked with faith-based screening data for any tie to the three categories.

02

We ask

Each flag gets the Primary Mission question. We remove it or keep it, and note why.

03

We show you

You can see what was screened out and what was kept, so nothing is hidden.