

FOR INVESTORS

Take this to your advisor

A short guide and a one-page request asking your financial advisor to apply Primary Mission Screening to your portfolio. It's free, simple, and they can start right away.

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

Primary Mission Screening is a free philosophy from Kingdom Mindset Investing. No license, no fee. No advisor? It works for your own portfolio too.

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)

Primary Mission Screening

Primary Mission Screening removes a company from a portfolio only 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

Used by Sherman Research. Sherman Research is a world-class investment research firm that has given away 51% of its profits to advance the Gospel since February 2026. Every stock and ETF in its research runs through Primary Mission Screening.

A request from your client

Advisor: _____

Client: _____

I'd like my portfolio to reflect my faith without pretending I can avoid every company in an interconnected world. Please apply **Primary Mission Screening** to my accounts. It's a free philosophy from Kingdom Mindset Investing, and the full method is in this guide.

Remove any company whose primary mission is abortion manufacturing, pornography production, or gambling. Keep companies with only a minor or incidental tie, and note why.

What I'm asking you to do

- ☐ Review my current stocks and funds using the Primary Mission question.
- ☐ Show me what would be removed and what would be kept, and why.
- ☐ Recommend replacements for anything removed.
- ☐ Apply the same screen to new recommendations going forward.

Questions I'd like answered

1. Which of my current holdings have a tie to the three categories?
2. For each one, is it the company's primary mission or an incidental tie?
3. Do any of my funds or ETFs hold primary-mission companies, and are there alternatives?
4. How will you keep this screen in place as my portfolio changes?

Advisors: this method is free to use and share with credit to Kingdom Mindset Investing. Questions: adam@kingdommindsetinvesting.com