



# Our Story

What does it take to pioneer a new kind of investing? Faith in a God who directs our paths. In 1992, Arthur Ally, then president and owner of Covenant Financial Management, was challenged to design a retirement plan for pastors of independent churches and offer it on a national scale. Mr. Ally searched the entire investment industry for any professionally managed program that would complement the Christian world-view of evangelical pastors.

The search unveiled several socially screened funds, which only screened for a few social issues such as alcohol and tobacco, but none that screened for more central issues such as abortion and pornography. The Lord used this challenge to burden Mr. Ally and cause him to rethink the current investment culture and ask the Lord if there was a better way—a way that would honor the Lord and allow others to invest with a clean conscience.

Through prayer and soul searching, he was convicted to make a life changing move. Mr. Ally spent the next two years developing and testing a moral screening model. This quest brought some very uplifting results, since the majority of companies, not necessarily run by Christians, had moral ethics that passed the biblical screens placed over them. That discovery indicated the potential for a screened fund to enjoy comparable performance to non-screened mutual funds.

At age 52, God called Art Ally to change his career path (a 15-year financial consultant/branch manager and 12 year public accountant) to launch America's first pro-life/pro-family mutual—fund. Through much prayer and faith in this calling, Mr. Ally sold his financial planning practice and pressed forward, moving into a nearby modest building, where Timothy Plan was born.

Raising one million dollars from a small group of loyal and faithful Christian investors through a local limited partnership (Timothy Partners, Ltd.), Mr. Ally went forth on the mission God had called him to embark upon.

Mr. Ally decided to initially focus on five major factors: abortion, pornography, alcohol, tobacco, and casino gambling. Years later, the screens for anti-family entertainment and alternative lifestyles were added to the mix, rounding out the screens that Timothy Plan is known for today.

Initially, Timothy Plan set out to be a no-load fund, which seemed to be the most feasible method to market the funds. Over time, more and more financial consultants were advising Mr. Ally to restructure Timothy Plan as a load fund. As a load fund, financial professionals would be able to offer Timothy Plan to their clients. Creating a wave of interest, Timothy Plan grew from its humble beginnings as a single fund to a full-fledged family of funds.

Finding highly competent portfolio management for a new mutual fund that incorporates very specific moral screens was a challenge. As other funds were opened, the challenges only seem to grow until—what could only be described as the hand of God directing Timothy Plan—a major international financial firm had a few faithful men who wholeheartedly endorsed what Mr. Ally was trying to do. With their assistance, Timothy Plan was able to upgrade portfolio management through the years, to the point where we can confidently say that we have attracted top-tier money managers across our entire family of funds.

Through this endeavor, Mr. Ally went on to help start an organization for Christian financial consultants (National Association of Christian Financial Consultants), became managing partner of a company that developed a tool to analyze mutual funds based on moral integrity (eVALUEator), coauthored a workbook series for Christian stewardship (Biblical Stewardship Series) and started an organization for pastors to become informed and take action in our communities (Florida Faith & Works Coalition).

Today, Timothy Plan continues to be the leader in the Biblically Responsible Investing arena. It continues to launch new funds in response to changing economic and other conditions, like the Israel Common Values Fund and the Defensive Strategies Fund. In conjunction with their Kingdom mission and focus, Timothy Partners provides financial support to numerous ministries including those involved in human trafficking, defending of Christian liberties, and preserving the life of the unborn. Mr. Ally's vision has grown, and with the guidance of a top-notch board of directors, God still remains the "real chairman of the board."



## TIMOTHY PLAN

800.846.7526

invest@timothyplan.com  
timothyplan.com

1055 Maitland Center Commons  
Maitland, FL 32751

*INVESTING IN A MUTUAL FUND MAY RESULT IN A LOSS OF PRINCIPAL. CAREFULLY CONSIDER THE INVESTMENT OBJECTIVES, RISKS, CHARGES AND EXPENSES BEFORE INVESTING. A PROSPECTUS IS AVAILABLE FROM THE FUND BY CALLING 800.846.7526, VISITING TIMOTHYPLAN.COM OR YOUR FINANCIAL PROFESSIONAL, THAT CONTAINS THIS, AND OTHER MORE COMPLETE, IMPORTANT INFORMATION. PLEASE READ IT CAREFULLY BEFORE INVESTING OR SENDING MONEY. TIMOTHY PLAN IS DISTRIBUTED BY TIMOTHY PARTNERS, LTD., MEMBER FINRA.*