



# Updating Equity, Bond, and Multiple Asset Fund Table

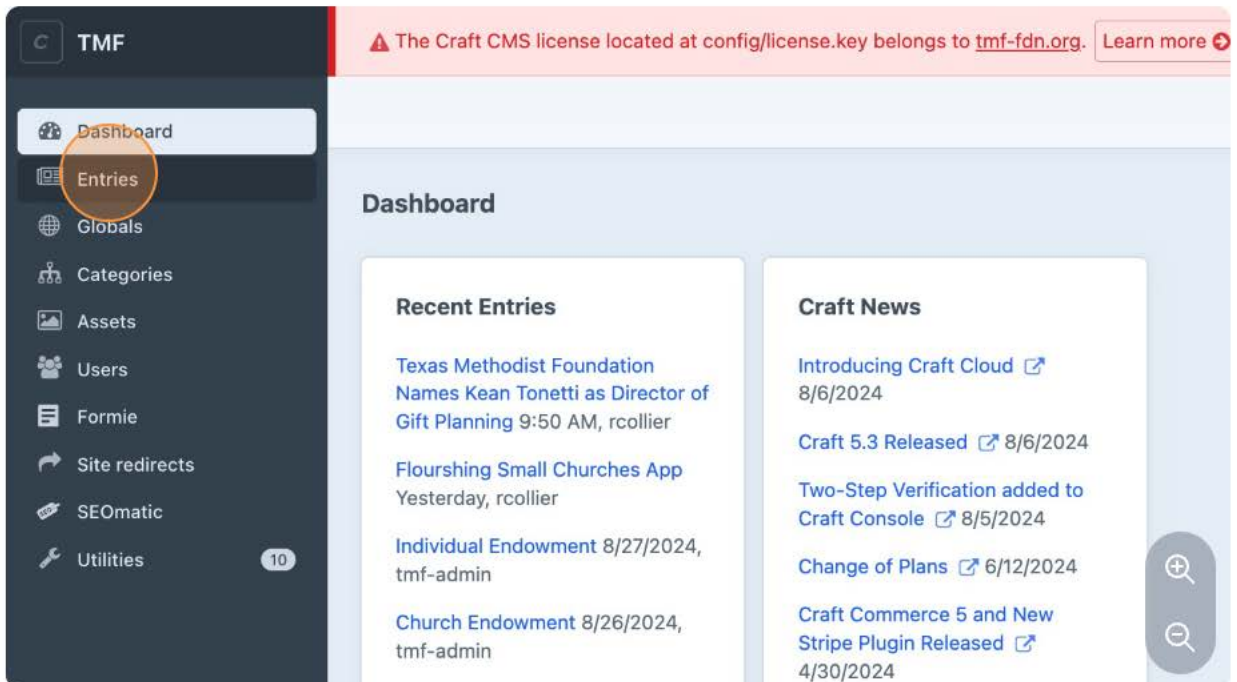
Ryan Collier | 15 steps | 2 minutes

 Texasmethodistfounda...

**i** This Scribe is only visible to you. Make any changes and then share it.

1 Navigate to <https://texasmethodistfoundation.org/admin/dashboard>

 Click "Entries"



**TMF**

**Dashboard**

**Entries**

**Globals**

**Categories**

**Assets**

**Users**

**Formie**

**Site redirects**

**SEOMATIC**

**Utilities** 10

**Recent Entries**

- Texas Methodist Foundation Names Kean Tonetti as Director of Gift Planning 9:50 AM, rcollier
- Flourshing Small Churches App Yesterday, rcollier
- Individual Endowment 8/27/2024, tmf-admin
- Church Endowment 8/26/2024, tmf-admin

**Craft News**

- Introducing Craft Cloud 8/6/2024
- Craft 5.3 Released 8/6/2024
- Two-Step Verification added to Craft Console 8/5/2024
- Change of Plans 6/12/2024
- Craft Commerce 5 and New Stripe Plugin Released 4/30/2024

**Dashboard**

**Recent Entries**

**Craft News**

**Introducing Craft Cloud** 8/6/2024

**Craft 5.3 Released** 8/6/2024

**Two-Step Verification added to Craft Console** 8/5/2024

**Change of Plans** 6/12/2024

**Craft Commerce 5 and New Stripe Plugin Released** 4/30/2024

### 3 Click "Tables"

A screenshot of a CMS navigation menu. The left sidebar contains icons for Assets, Users, Formie, Site redirects, SEOmatic, and Utilities. The main menu is divided into sections: SINGLES, NAVIGATION (Navigation Menu), STRUCTURES (Pages), CHANNELS (News, Tables, Team, Grant Recipients), and INVESTMENTS (Investments, Impact Certificates, Equity & Bond Funds, Investment Resources, Open an Account, Meet the Team, Investment Inquiry, Investment Inquiry Form For Individuals, Investment Inquiry Form For Organizations). The 'Tables' item under CHANNELS is circled in orange.

### Click "TMF Equity, Bond, and Multiple Asset Funds"

A screenshot of a CMS 'Entries' list. The left sidebar shows navigation options: All entries, Singles, NAVIGATION (Navigation Menu), STRUCTURES (Pages), CHANNELS (News, Tables, Team, Grant Recipients). The main content area has a search bar and a list of entries. The entry 'TMF Equity, Bond, and Multiple Asset Funds' is circled in orange. A search icon is visible in the bottom right corner.

Entry	Heading
<input type="checkbox"/> <a href="#">Open an Account</a>	
<input type="checkbox"/> <a href="#">How to Give</a>	
<input type="checkbox"/> <a href="#">TMF Equity, Bond, and Multiple Asset Funds</a>	TMF Equity, Bond, and Asset Funds <sup>2</sup>
<input type="checkbox"/> <a href="#">Rates for Individuals</a>	Rates for Individuals <sup>3</sup>
<input type="checkbox"/> <a href="#">Rates for Clergy</a>	Rates for Clergy <sup>2</sup>
<input type="checkbox"/> <a href="#">TMF Impact Certificates Fixed Rates for Churches, Foundations, and Nonprofits<sup>1</sup></a>	Rates for Churches, Foundations, and Nonprofits <sup>1</sup>

5 Click the "Subheading" field and change the date.

Multiple Asset Funds Current ▾ Preview View Create a draft

multiple Asset Funds

multiple Asset Funds<sup>2</sup>

**Subheading**  
Performance as of 08/31/2024

Width	Alignment	Type
	Left ▾	Single-line text ▾
	Left ▾	Single-line text ▾

Entry Type: Data Table

Slug: wespath-mutual-funds

Author: T tmf-admin ✕

Post Date: 5/22/2023 4:43 P

Expiry Date: 📅 ⌚

STATUS

Enabled

NOTES ABOUT YOUR CHANGES

6 Click this field and change the date.

Formie

- Site redirects
- SEOMATIC
- Utilities 10

**Heading**  
TMF Equity, Bond, and Multiple Asset Funds<sup>2</sup>

**Subheading**  
Performance as of 08/31/2024

**Data Table \***

**Table Columns**  
Add columns to your table

Heading	Width	Alignment	Type
		Left ▾	Single-line t
YTD 08/31/24		Left ▾	Single-line t
1 yr.		Left ▾	Single-line t
3 yr.		Left ▾	Single-line t
5 yr.		Left ▾	Single-line t
10 yr.		Left ▾	Single-line t
		Left ▾	Single-line t

+ Add a column

7

Click the cells to update the new percentages.

Site redirects

SEOMatic

Utilities

10

10 yr.

Left ▾

Single-line text ▾

Left ▾

Single-line text ▾

+ Add a column

**Table Content**

Add rows to your table

	YTD 08/31/24	1 yr.	3 yr.	5 yr.	10 yr.
TMF Balanced Fund	7.90%	12.57%	0.59%	7.01%	5.85%
TMF US Equity Fund	13.75%	20.25%	4.66%	13.23%	11.06%
TMF International Equity Fund	7.47%	12.54%	-3.25%	6.26%	4.38%
TMF Fixed Income Fund	3.97%	8.77%	-1.11%	1.05%	2.23%
TMF Inflation	1.99%	4.05%	0.49%	2.74%	2.22%

8

Repeat the previous step.

10 yr.

Left ▾

Single-line text ▾

✕ ✕

Left ▾

Single-line text ▾

✕ ✕

+ Add a column

**Table Content**

Add rows to your table

	YTD 08/31/24	1 yr.	3 yr.	5 yr.	10 yr.
TMF Balanced Fund	7.90%	12.57%	0.59%	7.01%	5.85%
TMF US Equity Fund	13.75%	20.25%	4.66%	13.23%	11.06%
TMF International Equity Fund	7.47%	12.54%	-3.25%	6.26%	4.38%
TMF Fixed Income Fund	3.97%	8.77%	-1.11%	1.05%	2.23%
TMF Inflation	1.99%	4.05%	0.49%	2.74%	2.22%

9 Click "Save"

Asset Funds Current ▾ Preview View Create a draft Save ▾

r.	3 yr.	5 yr.	10 yr.	
57%	0.59%	7.01%	5.85%	✖ ✖
.25%	4.66%	13.23%	11.06%	✖ ✖
54%	-3.25%	6.26%	4.38%	✖ ✖
7%	-1.11%	1.05%	2.23%	✖ ✖
15%	0.49%	2.74%	2.22%	✖ ✖
47%	0.61%	7.32%	6.32%	✖ ✖

Entry Type Data Table ▾

Slug wespath-mutual-funds

Author T tmf-admin ✖

Post Date 5/22/2023 4:43 PM ✖

Expiry Date 📅 ⌚ ✖

STATUS

Enabled

NOTES ABOUT YOUR CHANGES

10 To update the chart on the Equity, Bond and Multiple Fund page Click "Pages"

Entries All ▾ Search

- Globals
- Categories
- Assets
- Users
- Formie
- Site redirects
- SEomatic
- Utilities

10

Entries

- All entries
- Singles
- NAVIGATION
- Navigation Menu
- STRUCTURES
- Pages
- CHANNELS
- News
- Tables
- Team
- Grant Recipients

Entry

- Open an Account
- How to Give
- TMF Equity, Bond, and Multiple Asset Funds
- Rates for Individuals
- Rates for Clergy
- TMF Impact Certificates Fixed Rates for Churches, Foundations, and Nonprofits!

1-6 of 6 entries

11 Click "Equity & Bond Funds"

The screenshot shows a CMS interface with a sidebar on the left and a main content area. The sidebar has sections for 'Entries', 'NAVIGATION', 'STRUCTURES', 'CHANNELS', and 'Grant Recipients'. The 'Entries' section is active, showing a list of entries. The entry 'Equity & Bond Funds' is highlighted with a blue background and a red circle around the text. The main content area has a search bar and a list of entries with checkboxes and URIs.

Entry	URI
<input type="checkbox"/> <a href="#">Investments</a>	<a href="#">investments</a>
<input type="checkbox"/> <a href="#">Impact Certificates</a>	<a href="#">investments/impact-certificates</a>
<input type="checkbox"/> <a href="#">Equity &amp; Bond Funds</a>	<a href="#">investments/equity-and-bond-fun</a>
<input type="checkbox"/> <a href="#">Investment Resources</a>	<a href="#">investments/investment-resources</a>
<input type="checkbox"/> <a href="#">Open an Account</a>	<a href="#">investments/open-an-account</a>
<input type="checkbox"/> <a href="#">Meet the Team</a>	<a href="#">investments/meet-the-team</a>
<input type="checkbox"/> <a href="#">Investment Inquiry</a>	<a href="#">investments/investment-inquiry-fc</a>

Find the block with the Heading "TMF Equity & Bond Funds"

The screenshot shows a CMS block editor interface. On the left is a dark sidebar with navigation options: Categories, Assets, Users, Formie, Site redirects, SEOmatic, and Utilities. The main editor area shows a 'Section Heading' block. The heading text 'TMF Equity & Bond Funds' is highlighted with a red circle. Below the heading is a 'Description' field with a rich text editor toolbar. The text in the description field is partially visible, mentioning 'TMF offers six alternative equity and bond funds...' and 'TMF Equity & Bond Fund assets are invested with Wespath Institutional Investments...'.

Enter a url-friendly identifier for this section of the page. Use all lowercase letters and dashes instead of spaces. Ex: for-churches, or impact-investing. Link to this section with a URL like /impact-investing/impact-notes#for-churches

balanced-portfolio

**Section Heading**

Heading	Size	Alignment	Text Col
TMF Equity & Bond Funds	H2 (Large)	Left	Default

**Description**

TMF offers six alternative equity and bond funds, providing investors with options for alternative portfolio allocations, and levels of international exposure.

TMF Equity & Bond Fund assets are invested with [Wespath Institutional Investments](#), an investment management subsidiary of Wespath Benefits and Investments, founded in 1981. Wespath Benefits and Investments oversees nearly \$25 billion in assets for over 100,000 retirement

13 Within that block click "Tables"

The screenshot shows a CMS editor interface. At the top, there is a header with the text "& Bond Funds" and a "Current" dropdown menu. To the right, there are "Preview" and "View" buttons. Below the header, the main content area is divided into several sections. The "Data Table" section is active, and the "Tables" tab is selected, highlighted with an orange circle. The "Tables" tab contains a "Pre-heading" field. Below it, there is a table configuration section with columns for "Heading", "Size", "Alignment", and "Text Color". The "Heading" field is set to "TMF Equity & Bond", "Size" is "H2 (Large)", "Alignment" is "Left", and "Text Color" is "Default". To the right of the main editor, there is a sidebar with social media links for Facebook and LinkedIn, and a logo for the Texas Methodist Foundation.

Click the "Subheading" field and change the date to most current date.

The screenshot shows a CMS editor interface. The "Data Tables" block is active, and the "Subheading" field is selected, highlighted with an orange circle. The "Subheading" field contains the text "Performance as of 08/31/2024". Below the "Subheading" field, there is a "Table" section with a table header "TMF Equity, Bond, and Multiple Asset Funds". Below the table, there is a "Table Footer" section with a text area containing the text: "Returns represent past performance and do not guarantee future results or the deduction of administrative fees, which are assessed by TMF monthly, for all funds except the TMF Bond Fund which reflects the deduction of administrative fees. Investment returns will fluctuate with market conditions."

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Save the page and exit.