

Charitable Funds Investment Options

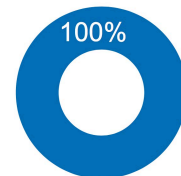
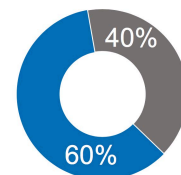
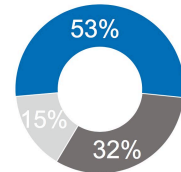


Fairfield County's Community Foundation offers a variety of investment options designed to meet your philanthropic goals and objectives.

Each of our investment options is carefully constructed to maximize return and minimize volatility. The long-term investment portfolio is managed by our nationally recognized consultant, NEPC, along with our Investment Committee.

Investment Options:

- Long-Term Growth:** The investment objective is long-term capital appreciation. The portfolio will be actively managed and invested in a diversified portfolio of Global Equity, Fixed Income, and Alternative Investment Strategies. The largest asset allocation is **53% Equity**, **32% Alternative Investments** and **15% Fixed Income**.
- Vanguard Balanced Fund (VBIAX):** The Fund invests in a diversified portfolio of passive Index Funds with a target asset allocation of **60% Equity** and **40% Fixed Income**. The Fund provides access to a range of sector funds, offering broad diversification across multiple asset classes. The Balanced Fund is designed for investors seeking a balance between income and capital growth.
- Money Market:** This investment option provides donors with liquidity and principal protection. The Fund invests in **Money Market securities** and **FDIC Insured CDARs CDs**.



Custom Options:

- Your Investment Advisor:** For charitable funds \$250,000 or more, the Community Foundation can work with your own trusted financial advisor to manage your fund. If this option is right for you, simply put us in touch with your financial advisor and our team will take care of the rest.
- Social Impact Portfolio:** For larger charitable funds, the Community Foundation can help you set up a social impact portfolio that aligns your values and charitable goals.