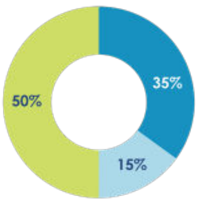
INVESTMENT PHILOSOPHY

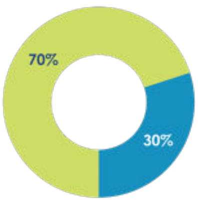
The Community Foundation for Palm Beach and Martin Counties offers a variety of investment options designed to meet a range of philanthropic goals and time horizons.

Each of our investment portfolios is carefully constructed and diversified across global investment opportunities to maximize return and minimize volatility. Our size provides access to world-class investment managers and alternative investment strategies only available to large institutional investors.

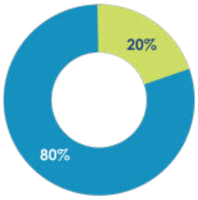
OPTION 1 – COMMUNITY FOUNDATION INVESTMENT PORTFOLIOS



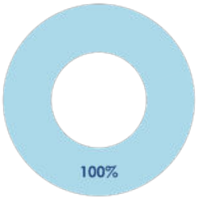
Long-Term Growth: The investment objective is long-term capital appreciation. The portfolio will be actively managed and invested in a diversified portfolio of Global Equity, Fixed Income, and Alternative Investment strategies. The target asset allocation is 50% Equity, 35% Alternative Investments and 15% Fixed Income. The suggested time period for this strategy is five years or longer.



Indexed: The investment objective is long-term capital appreciation with a secondary objective of current income. The Fund will invest in a diversified portfolio of passive Index Funds with a target asset allocation of 70% Equity and 30% Fixed Income. The suggested time period for this strategy is five years or longer.



Balanced Income: The investment objective is current income and preservation of capital. The Fund will invest in a diversified portfolio with a target asset allocation of 80% intermediate Fixed Income and 20% Equity. The suggested time period for this strategy is two to five years. The Balanced income is for non-endowed funds only.



Money Market: This investment option provides donors with liquidity and principal protection. The Fund will invest 100% in Money Market securities, FDIC Insured CDs, and short-term US Government Securities. The suggested time period for this strategy is one year or less.

OPTION 2 – INDIVIDUALLY MANAGED ACCOUNTS

The Community Foundation will let you work with your trusted financial advisor to manage your fund. With this option, you can benefit from custom investment management by an advisor you already know and trust. 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.

COMMUNITY FOUNDATION
FOR PALM BEACH AND MARTIN COUNTIES

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