



THE CATHOLIC
COMMUNITY FOUNDATION

We
Grow

OUR INVESTMENT STRATEGY

We are grateful for the assets entrusted to us by and for the community, and we are committed to designing a strategy that maximizes investment results. Our goal is to grow each fund's total return to provide a steady stream of income that fuels grants, supporting both our mission and the mission of each beneficiary organization. We believe that the best way to reach our goal is through professional investment oversight and access to a well-diversified portfolio.

Jordan Park



Jordan Park is the investment advisor for the Foundation. Their team of experienced, empathetic and results-oriented managers provides data-driven investment and financial advice for all the Foundation's funds. Jordan Park's mission to enhance lives and legacies aligns with the Foundation, working to create **FOREVER VALUE** for our local Catholic community and to serve community needs.

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Tell them to do good, to be rich in good works, to be generous, ready to share, thus accumulating as treasure a good foundation for the future, so as to win the life that is true life. 1 Timothy 6:18-19

Gather

Grow

Give



Investment Oversight

Our three main objectives are to:

- 1 ▶ Focus on the long-term returns, providing **FOREVER VALUE** for our beneficiaries
- 2 ▶ Pool assets to capitalize on scale, cost, and access to top managers
- 3 ▶ Participate in responsible investing, which includes both Catholic screens and impact investing



Investment Pools

	OBJECTIVE	ASSET MIX	GRANTING TIMEFRAME
▶ Endowment Pool	Emphasis on earning a rate of return to sustain grantmaking & withstand inflation (providing FOREVER VALUE)	Global securities, fixed income, alternatives (including private assets)	Perpetual
▶ Long-Term Growth Pool	Emphasis on growing funds for long term needs, while maintaining liquidity/flexibility to respond to the unknown	Global securities, fixed income, alternatives	7-10 Years
▶ Balanced Pool	Balancing growth objective with reduced volatility	Global securities, fixed income	3-7 Years
▶ Capital Preservation Pool	Asset preservation and liquidity	Cash & cash equivalents	1-3 Years

▶ **Asset Allocation Detail**

For more details, read our *Investment Summary* document which includes results for each pool and the strategic asset allocation policy we have adopted for each pool. Be aware that our investments are monitored continuously by our experienced investment committee, advisors, and staff. Asset allocations in each pool may be adjusted in response to changing conditions in charitable giving and/or in the financial markets.

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▶ Contact Us

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