



# Investment Program

**T**he Greater Kansas City Community Foundation's investment program offers the flexibility to customize your fund's investments to meet your charitable goals, whether they are immediate or long term. You advise how contributions to your fund are invested, ultimately maximizing the potential of your charitable dollars.

## TWO WAYS TO PARTICIPATE

You may choose to have your trusted financial advisor manage your fund.

OR

You may select your own allocation using one or more of the Community Foundation's investment pools.

Under either option you will receive regular reports on fund information, including investment performance.

### Working with Your Financial Advisor

With this option you can benefit from customized investment management by an advisor you already know and trust. Simply put the Community Foundation in touch with your financial advisor and our team will take care of the rest.

### Investment Pools

Depending on how you plan to use your fund, you can choose which investment pool best fits your charitable giving goals. The Community Foundation's investment pools are organized according to asset class and include the following: Money Market, Fixed Income, Alternative Investment and Equity. When you set up a fund, you can select from these pools, and you have the flexibility to change your investment option at any time. Asset allocations are rebalanced at the end of every month.

The responsibility for managing the Community Foundation's investment program is vested in the Foundation's Board of Directors through its Investment Committee. This committee works closely with staff and the Community Foundation's investment advisors to set policy, establish performance benchmarks and monitor performance.

