ABOUT OUR INDEX POOL OPTIONS



Our **Index Pool Options** are designed for philanthropists who prefer a passive management investment approach with lower investment management fees. We offer a range of asset allocations so that donors can select the investment strategy that matches their tolerance for risk. Expenses range from approximately 5 to 8 basis points.

Our Investment Philosophy

The Community Foundation understands that some donors prefers a low-cost, passive investment approach, as opposed to the active management offered in the Perpetual and Long-term Flexible Pools. The Foundation's Index Pool options all use the same two index ETFs: SPDR® Portfolio MSCI Global Stock Market ETF (SPGM) and the iShares Core U.S. Aggregate Bond ETF (AGG.) The equity portion of these strategies include both US and international exposures. The fixed income ETF seeks to track the US investment grade bond market.

Asset Allocation

The Foundation offers 80/20, 60/40, and 40/60 equity/fixed income asset allocation pools using the aforementioned ETFs. These pools are rebalanced monthly.

community foundation

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