

Historical Investment Performance

The Community Foundation offers a variety of investment options to meet a range of charitable goals and time horizons. Each investment portfolio is carefully constructed and diversified across global investment opportunities to maximize return and minimize volatility. Returns are net of all investment fees. Returns for periods greater than one year are annualized.

The **Long-Term Growth Portfolio** seeks maximum growth and controlled risk through a diversified portfolio of global stocks, bonds and alternative investment strategies.

11%
2024

7.7%
*Five-year
Annualized Return*

6.9%
*Ten-year
Annualized Return*

The **Indexed Growth Portfolio** seeks maximum growth, primarily through indexed funds, resulting in lower active management risk.

10.7%
2024

6.6%
*Five-year
Annualized Return*

6.4%
*Ten-year
Annualized Return*

The **Moderate Growth Portfolio** is designed for growth at a more moderate level of risk.

7.9%
2024

4.2%
*Five-year
Annualized Return*

4.2%
*Ten-year
Annualized Return*