

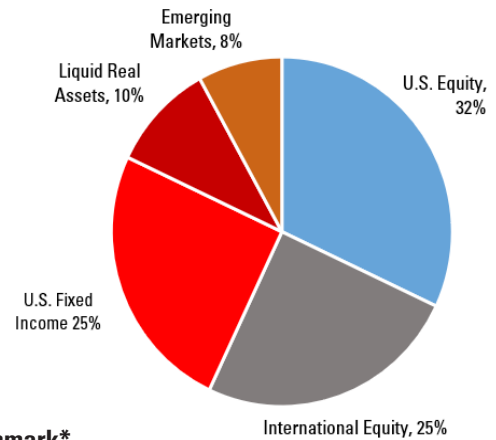
# PASSIVE LONG-TERM GROWTH POOL

Foundation For The Carolinas offers diverse investment options to grow assets for maximum philanthropic impact

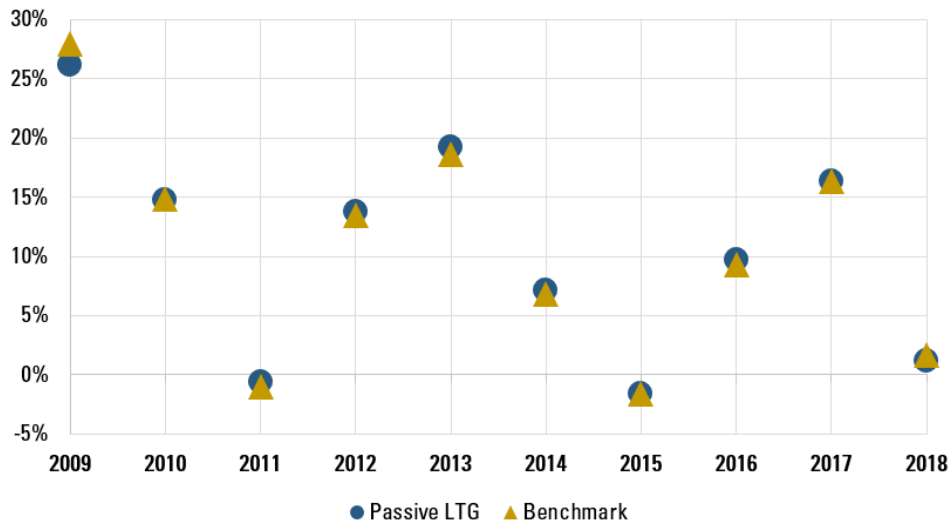


- ▶ Offers broad domestic, international and emerging market exposure via large cap and small cap securities combined with a modest allocations to global fixed income and real assets
- ▶ This passive portfolio is built using low-cost funds

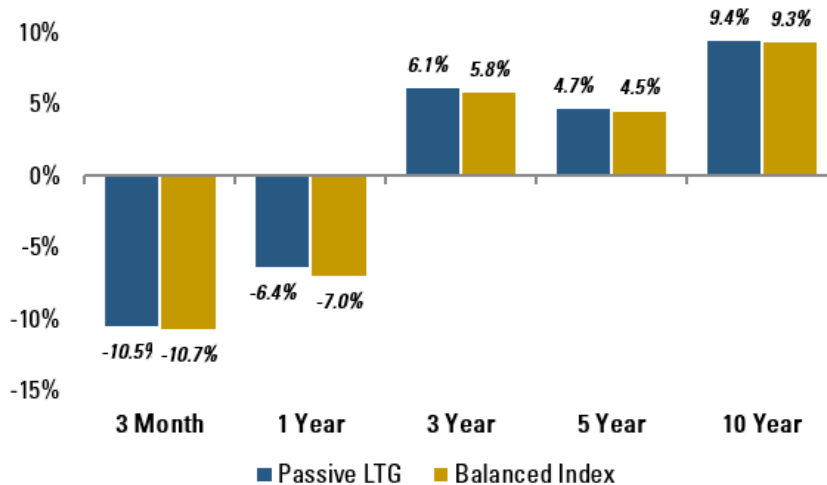
## Target Allocations



## Annual Performance vs. Benchmark\*



## Actual and Pro Forma Returns\* (as of December 31, 2018)



### Contact us today for more information:

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\*Actual returns net of fees for 3 month, and 1 year periods. Proforma returns for remaining periods. Benchmarks available upon request.

# PASSIVE LONG-TERM GROWTH POOL

## Asset Allocation, Managers and Expenses



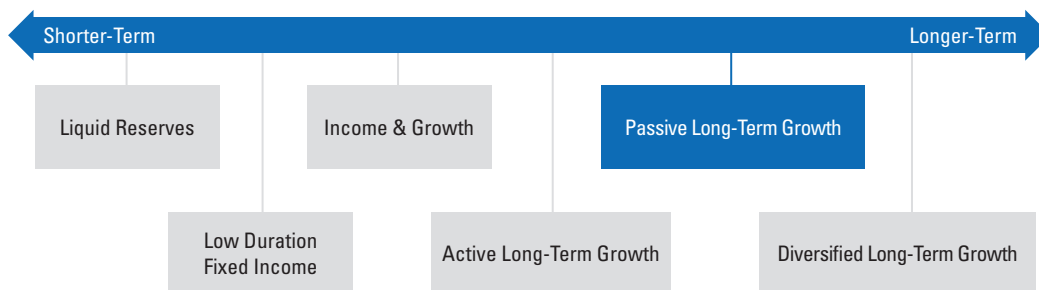
### Growth Assets

<b>US Equity</b> - SSgA S&P 500 - SSgA Russell 2000	32%	<b>International Equity</b> - SSgA MSCI EAFE	25%
<b>Emerging Markets Equity</b> - SSgA Emerging Markets	8%	<b>Liquid Real Assets</b> - S&P Global Large/Mid Natural Resources - S&P Global Infrastructure - S&P Global Real Estate	10%

### Risk Reduction Assets

<b>Fixed Income</b> - SSgA U.S. Aggregate Bond	25%
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### Asset Strategies



Individual fund earnings may not reconcile to Foundation For The Carolinas' reported performance as a result of contributions, distributions and rebalancing in the fund. A successful investment program includes consideration of your grantmaking intentions and timeframe for investments. Past performance is not indicative of future results.

**Expense Ratio\* 0.25%**

\*Includes weighted Investment Manager and other investment-related expenses.