

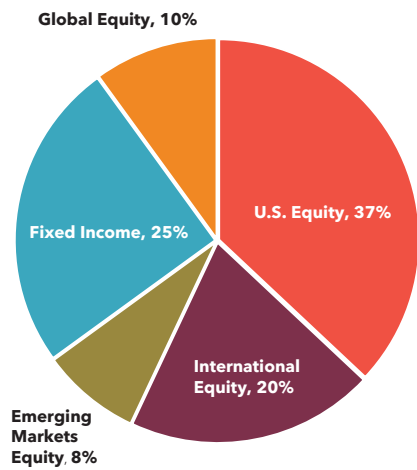
ESG LONG-TERM GROWTH POOL

Foundation For The Carolinas offers diverse investment options for philanthropic impact



- ▶ Diversified portfolio with exposures across major global equity markets with a modest allocation to fixed income.
- ▶ Seeks long-term capital appreciation using active investment managers who incorporate environmental, social and governance (ESG) factors into their security selection process.
- ▶ The United Nations has established 17 Sustainable Development Goals (SDGs) which are meant to end poverty, protect the planet and ensure prosperity for all.
- ▶ This portfolio measures favorably across all 17 SDGs when compared against its passive benchmark. Among the SDG goals for which this portfolio shows particular emphasis are gender equality, decent work and economic growth, responsible consumption and production, and climate action.
- ▶ The average ESG rating of investment managers in this pool is less than 2 (on a scale of 1 to 4, with 1 being the highest rating).
- ▶ Nearly half of the portfolio's assets are managed by Minority or Women Business Enterprises, or by diverse investment teams.
- ▶ Applying ESG factors can result in performance differences when compared to the overall market or comparable funds that do not employ similar ESG factors. These differences may be attributable to amounts allocated to certain issuers, industries, and sectors.

TARGET ALLOCATIONS



RETURNS* (AS OF DECEMBER 31, 2024)



Contact us today for more information:

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Learn more
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*Net of investment fees. The weighted average benchmark is 39% Russell 3000, 19% MSCI EAFE, 7% MSCI EM, 10% MSCI ACWI, 25% Bloomberg US Aggregate. Inception Date: 11/30/2021

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ESG LONG-TERM GROWTH POOL

Asset Allocation, Managers and Expenses



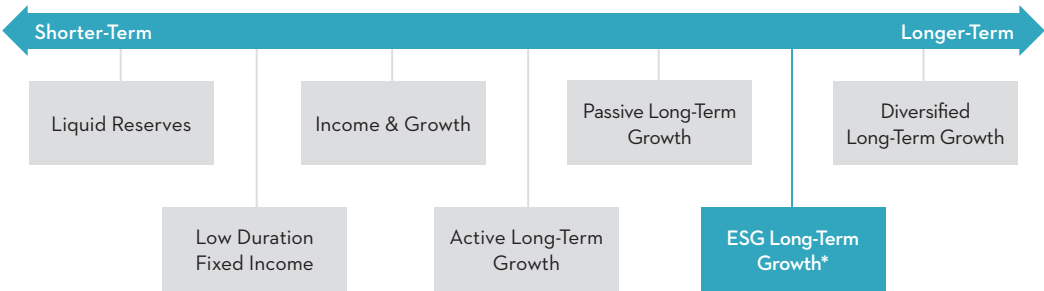
GROWTH ASSETS

U.S. Equity - Vanguard FTSE Social Index Fund - Boston Trust Walden Small/Mid - Brown Advisory Small Cap Growth	39%	International Equity - Boston Common ESG Impact International - Causeway International Value	19%
Emerging Markets Equity - Artisan Sustainable Emerging Markets - Ninety-One Emerging Market Equity	7%	Global Stocks - Mirova Global Sustainable Equity - RBC Global Opportunities	10%

RISK REDUCTION ASSETS

Fixed Income - Neuberger Core Bond Institutional - Payden & Rygel Low Duration	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.

*The ESG Long-Term Growth pool is currently available to FFTC fundholders only, with expansion to supporting organizations – such as GCCT and FCJC – in the future.

Expense Ratio** 0.80%

**Includes weighted Investment Manager fees, FFTC investment fee, and other investment-related expenses. Please note administrative fees are charged separately. Administrative fee schedules are available on our website at www.fftc.org/advisor_resources#administrative-fee-schedules.