

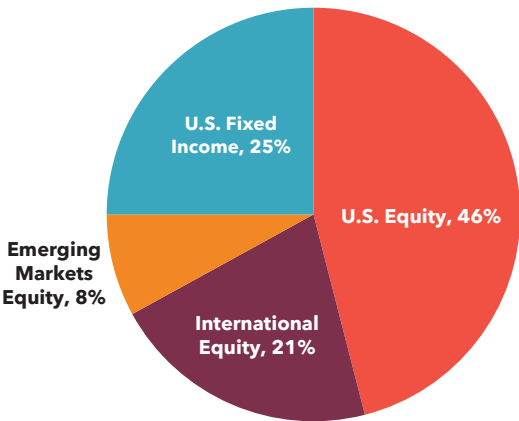
PASSIVE LONG-TERM GROWTH POOL

Foundation For The Carolinas offers diverse investment options for 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 common trust funds

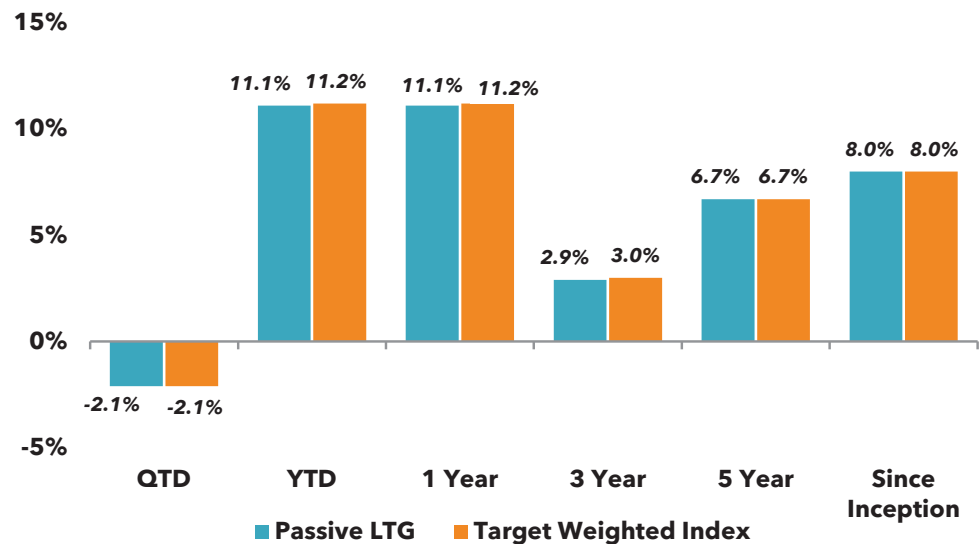
TARGET ALLOCATIONS



ANNUAL PERFORMANCE VS. BENCHMARK

	2024	2023	2022	2021	2020	2019	2018	2017
Passive LTG	11.1%	16.2%	-15.6%	12.6%	12.6%	21.5%	-6.5%	16.4%
Benchmark	11.2%	16.3%	-15.5%	12.8%	12.0%	22.1%	-7.0%	17.0%

RETURNS* (AS OF DECEMBER 31, 2024)



Contact us today for more information:

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*Net of investment fees. The weighted average benchmark is 39% S&P 500, 7% Russell 2000, 21% MSCI EAFE, 8% MSCI EM, 25% Bloomberg US Aggregate. Inception Date: 07/31/2016

GROWTH ASSETS			
US Equity	46%	International Equity	21%
- SSgA S&P 500 Index		- SSgA MSCI EAFE Index	
- SSgA Russell 2000 Index			
Emerging Markets Equity	8%		
- SSgA MSCI Emerging Markets Index			

RISK REDUCTION ASSETS	
Fixed Income	25%
- SSgA U.S. Aggregate Bond Index	



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** 0.18%

**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.ffc.org/advisor_resources#administrative-fee-schedules.