

Index Pool Options

The Community Foundation is structured to provide philanthropic resources for the Richmond community. Our index pool options are designed for philanthropists who prefer a passive management investment approach with lower investment management fees. It is comprised of domestic and international equities, as well as fixed income.

Investment management fees are approximately 6.8 basis points.

Investment Philosophy

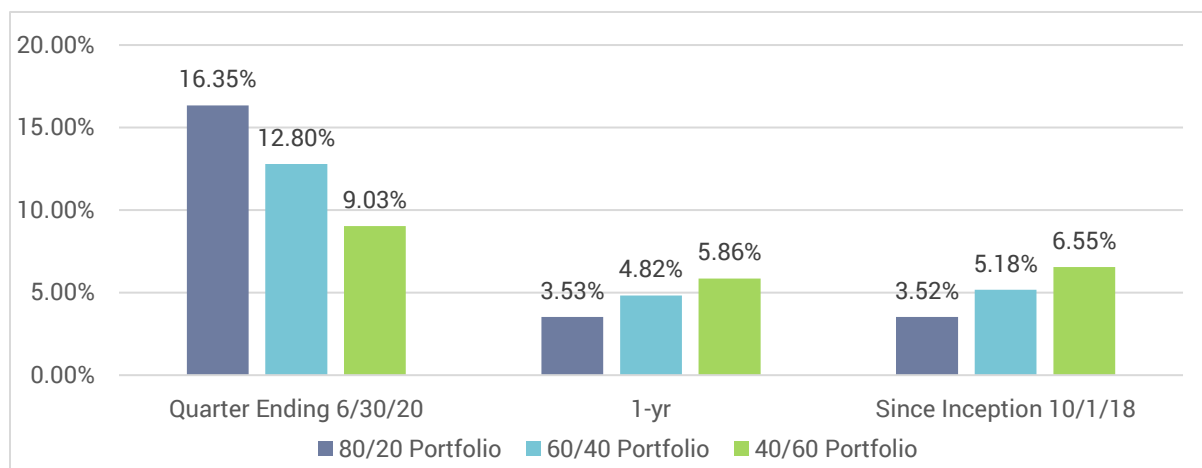
The Community Foundation has partnered with Vanguard Institutional Investor Group to provide a lower cost option designed for charitable assets with varying time horizons. Each asset allocation option is comprised of four Vanguard indexed funds – Total Stock Market Index, Total International Stock Index, Total Bond Market Index and Total International Bond Index.

Asset Allocation

Three asset allocation options are available for charitable funds – 80% equity / 20% fixed income, 60% equity / 40% fixed income, and 40% equity / 60% fixed income. Donors should consider their time horizon and risk tolerance when selecting the asset allocation that works best for their charitable fund.

	Equity		Fixed Income	
	Total Stock Market Index	Total International Stock Index	Total Bond Market Index	Total International Bond Index
80/20 Index Option	48%	32%	14%	6%
60/40 Index Option	36%	24%	28%	12%
40/60 Index Option	24%	16%	42%	18%

Investment Performance (as of 6/30/20)



For more information, please contact Michelle Nelson or Lauren Shephard at 804-330-7400 or mnelson@cfrichmond.org or lshephard@cfrichmond.org.