



Fund Investment Options

Community Foundation of the Lowcountry offers a variety of investment options, each designed to meet a range of philanthropic goals and time horizons. Each investment pool is carefully constructed and diversified to maximize return and limit volatility.

Long Term Growth Pool

The long-term growth pool seeks long-term capital appreciation. The current asset allocation is 65% equity, 25% fixed income and 10% real assets. The pool offers investors broad domestic and international market exposure, investing in large cap and small cap securities in developed and emerging market countries. This option is an appropriate strategy for investors who seek capital appreciation. The pool is designed for investors with a long-term time horizon (greater than five years).

Moderate Growth Pool

The moderate growth pool seeks long-term capital appreciation; current income is a secondary focus. The pool's asset allocation is 45% equity, 45% fixed income and 10% real assets. The pool offers investors broad domestic and international market exposure, investing in large cap and small cap securities in developed and emerging market countries. The moderate growth pool is an appropriate strategy for investors who seek capital appreciation with moderate risk. The moderate growth pool is designed for investors with a 3-5 year time horizon.

Passive Option

The Community Foundation offers a passive option for those investors who seek broad market exposure at a reduced investment management expense. The current option is an exchange-traded fund (ETF) with an asset allocation of 60% global equity and 40% fixed income.

Short Term Pool

The short-term pool has no risk tolerance. The pool's asset allocation is invested 100% in money markets, U.S. Treasuries and CDs. The short-term pool is an appropriate strategy for investors who do not seek capital appreciation, but also do not want any risk. The short-term pool is designed for investors with a 1-2 year time horizon.

The investment mix in these pools may change periodically. For more information about the Fund Investment Options, please contact the Community Foundation at 843.681.9100.