



# Catholic Foundation of Southwest Iowa

INVESTMENT TIME HORIZON

0-2 years

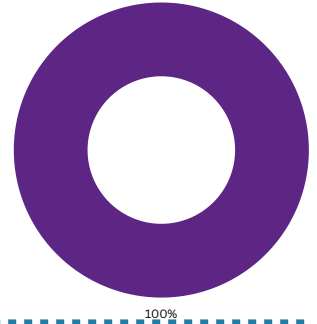
## Money Market

### Objectives

The Money Market Fund is designed for fund-holders who wish to make grants immediately or who cannot sustain any loss of principal over any time horizon.

### Asset Allocation

100% - Cash  
Equivalents



3-7 years

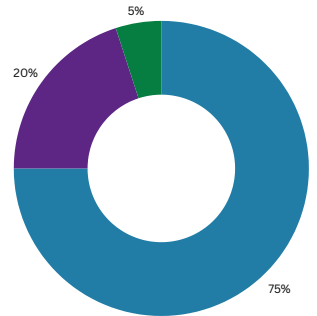
## Capital Reserve

### Objectives

Designed to be moderately conservative and emphasize shorter-term income over longer-term growth.

### Asset Allocation

75% - Fixed Income  
20% - Equity  
5% - Real Assets



7+ years

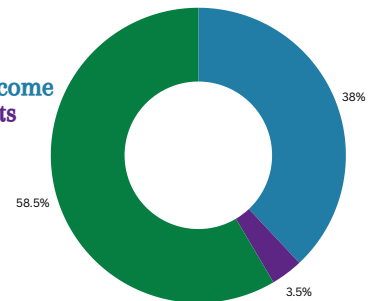
## Moderate Growth

### Objectives

Designed to be moderately conservative and emphasize shorter-term income (over 1-5 years) with downside protection and low capital appreciation. This pool does utilize alternative investments but to a lesser extent than that of the Strategic Growth Fund.

### Asset Allocation

58.5% - Equity  
38.0% - Fixed Income  
3.5% - Real Assets



20+ years

## Strategic Growth

### Objectives

Suitable for fixed annual spending objectives within 4-6%. The risk return profile is designed to be similar to that of an Endowment Pool that includes both income and capital appreciation components and the use of alternative investments. This is the riskiest option of the three pools and designed for fixed spenders of a pool of capital.

### Asset Allocation

55% - Equity  
30% - Multi-Strategy  
10% - Fixed Income  
5% - Real Assets

