

INVESTMENT OPTIONS

The Community Foundation of Central Missouri's investment program offers the flexibility to customize your fund's investments to meet your charitable goals, whether they be intermediate or long term.

Our fund investments are managed by Commerce Trust, through our back-office partner, the Community Foundation of Northwest Missouri (CFNWMO).

There are two ways to participate:

OPTION 1: Have your trusted Financial Advisor manage your fund

With this option you can benefit from custom investment management by an advisor you already know and trust.



If this option is right for you, simply put the Community Foundation of Central Missouri in touch with your financial advisor and our team will take care of the rest.

OPTION 2: Select your investment mix using one of ours or create your own

The Community Foundation of Central Missouri allows you to match your investment strategy with your risk tolerance and long-term objectives for your fund. The mixes are organized according to asset class pools and include the following: Money Market, Fixed Income, Equity, and Alternatives. You may change your investment mix as often as you like. Mix changes submitted during the month will be implemented at the beginning of the following month.

The responsibility for managing the Community Foundation's investment program is vested in the Community Foundation's Board of Directors through its Finance Committee. The percentages in the mix options may change from time to time upon Finance Committee review.



EQUITIES



FIXED INCOME



ALTERNATIVES



MONEY MARKET