



# Fund Investment Pool Election Form

To elect your fund's investment option, please complete this form and email to [finance@alaskacf.org](mailto:finance@alaskacf.org) by July 31.

Fund Name: \_\_\_\_\_

The Alaska Community Foundation offers three (3) investment pools. You may request to customize your fund's charitable investments to meet your charitable goals by completing this form. All pools contain commingled funds for the purposes of investment. The following investment pools are available at The Alaska Community Foundation (ACF):

**Option 1 – Long Term Pool**

Our default pool for all funds, this long-term pool was created for the bulk of ACF's assets and is structured using our traditional investment policy statement with targeted investments in Global Public Equities – 53.50%, Global Fixed Income/Credit – 25%, Real Assets – 9%, Diversifying Strategies – 10%, and Cash/Equivalents 2.5%. The focus of this fund is growth of capital with a diversified risk profile. This pool is the main investment strategy of the Investment Policy Statement and is invested across a diversified platform at the direction of the Investment Committee for long-term conservative growth.

**Option 2 – Environmental, Social and Corporate Governance (ESG) Investment Pool**

A balanced index-tracking, fund-of-funds that provides moderate growth exposure to global stocks and bonds with positive ESG characteristics. The index uses a fixed allocation of 60% all-cap Global Equity Exchange-Traded-Funds (ETFs) and 40% USD-denominated investment-grade fixed income ETFs to represent a risk profile that is intended for moderate growth. The ESG Investment Pool utilizes overall negative screens for civilian firearms, controversial weapons, oil sands, thermal coal, tobacco, and a positive screen for favorable ESG practices (including Diversity Equity and Inclusion).

**Option 3 – Short Term Pool**

This pool accommodates funds that are generally short-term in nature and is focused on investment of capital with minimal risk and returns.

The election of investment pool will dictate the asset allocation and potential risk/return profile your fund's assets will experience. By selecting the pool, and signing below, as an authorized fund advisor for the fund listed at the top of this form, I understand that the investment returns my charitable assets experience over time may be different than other funds here at ACF, and/or returns in other investment pools offered by ACF. I understand that past performance is no indication of future performance or returns, and that I am willing to accept the returns and investment fees produced by the investment pool I elect. I also understand that I may change pools annually during a sixty-day open-enrollment period starting on June 1 each year.

Authorized Signer for Fund: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Date: \_\_\_\_\_

*(All fund advisors must sign the election form. Use additional page if necessary. If fundholder is a nonprofit organization, a formal board resolution must accompany this form. If no election form is received, Option 1 is the default.)*