



Investment Options

We believe it is important to find the right fit for your giving. Working with our investment advisor, Atlanta Consulting Group (ACG), and our locally-based Investment Committee, we offer investment strategies to help you meet your giving goals.

Investment Pools

The Foundation has four investment pools, each with a specific investment objective. Donors will be asked to select one of the following pools when establishing their Fund:

Investment Options	Money Market Pool	Fixed Income Pool	Balanced Pool	Equity Pool
Asset Allocation Targets	100% Money Market Funds	100% Global Fixed Income	52% Global Equities, 25% Global Fixed Income, 5% Real Assets, 14% Diversifying Strategies, 4% Cash	90% Global Equities, 10% Real Assets
Investment Objective	0 - 2 Years	2 - 5 Years	> 5 Years	> 5 Years
Risk	Low	Low - Moderate	Moderate - High	High
Appropriate Fund Lifespan	0 - 2 Years	2 - 5 Years	> 5 Years	> 5 Years
Fund Advisor	N / A	ACG	ACG	ACG

Note: Prospective donors with fund balances of \$500,000 or more may recommend their Fund's assets be invested with an outside manager. All outside managers must be approved by the WF Investment Committee and must agree to conform to the WF Investment Policy Guidelines. These recommendations are considered on a case-by-case basis. This option is not available for certain types of funds.