



Altona Community Foundation

For today's needs and tomorrow's dreams.

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Investment Policy

APPROVED:

March 17, 2021

SUBJECT TO REVIEW:

Annually at planning sessions

The Altona Community Foundation holds endowment, restricted and unrestricted, funds for investment and administers flow through funds on behalf of other eligible organizations. The two guiding principles in determining how the Altona Community Foundation invests endowment funds are:

1. RISK TOLERANCE

The investment portfolio must be structured in such a way as to maximize investment return while assuming an appropriate level of risk, as determined by the Altona Community Foundation. The primary investment philosophy of Altona Community Foundation is the safety of principal via limited responsible risk of long term investments.

2. TIME HORIZON

The Altona Community Foundation endowment funds will be held in perpetuity and therefore the investment portfolio must be structured and managed with a long-term horizon.

In order to best achieve these principles, the Altona Community Foundation has pooled its endowments for investment purposes with The Winnipeg Foundation. As such, The Winnipeg Foundation Investment Policy has been adopted by the Altona Community Foundation board of directors as its investment policy.

The Altona Community Foundation may directly administer Flow-Through Funds in accordance with the applicable fund agreement and in consultation with the partner organization.

This policy was reviewed by the board on March 17, 2021.