Longmont Community Foundation Investments

Our investments are managed by BOK Financial, locally known as Colorado State Bank and Trust. Oversight of our investment manager is provided by our Investment Advisory Committee (comprised of financial planners) as well as our Board of Trustees. Our full Investment policy is available upon request by calling 303-678-6555.

Four Ways to Invest your Donor Advised Fund with the Longmont Community Foundation. Select the one that best fits your strategy

1. Utilize our **Main Investment Pool**
   A balanced portfolio constructed to emphasize long-term growth. A mixture of equities, alternatives and fixed assets. This is the pool that most donor fund advisors use.

2. Invest in our **Socially Responsible Investment Pool**
   For donors that wish to pursue investment returns in a manner that considers the societal impact of companies. The SRI is a mixture of equities and alternatives.

3. Retain **Your Own Investment Manager**
   We recognize that you may have an existing relationship with an investment manager. You may have the assets of your fund managed by your own trusted investment advisor.

4. Use our **Short-Term Checking Account or CD Option**
   Good for those fund holders that are looking to do a quick turnaround for their grants.

Investment Returns

	Main	SRI
2017	14.46%	14.64%
2016	5.11%	8.70%*
2015	-2.37%	
2014	4.00%	
2013	12.49%	
2012	14.31%	
2011	-1.25%	
2010	12.80%	
2009	21.52%	
2008	-22.72%	
2007	10.40%	
2006	12.00%	
Average	**+6.73%**	

*SRI created February 2016

Investment Advisory Committee

Gene Schnabel, Chair
Retired VP of Finance at a Houston division of Emerson Electric Company

Monica Baldwin, Vice Chair
President and Financial Advisor, RJFS, Main Street Investments

Mark Boelman
Accountant, Left Hand Brewing

Matt Gorr
President, First Western Trust

Samuel Napp
CPA, Financial Planner, BSW Wealth Management

Jake Van Kessel
Financial Advisor, Merrill Lynch Wealth Management