

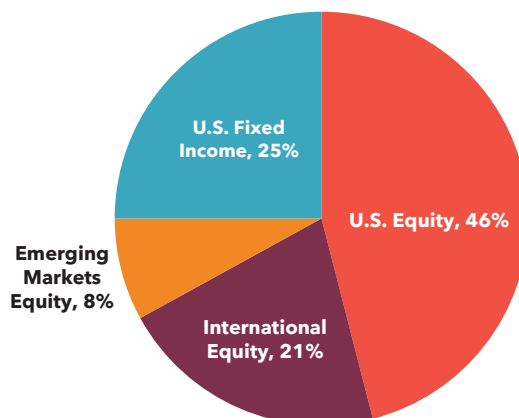
# PASSIVE LONG-TERM GROWTH POOL



Foundation For The Carolinas offers diverse investment options for philanthropic impact

- ▶ Offers broad domestic, international and emerging market exposure via large cap and small cap securities combined with a modest allocations to global fixed income and real assets
- ▶ This passive portfolio is built using low-cost common trust funds

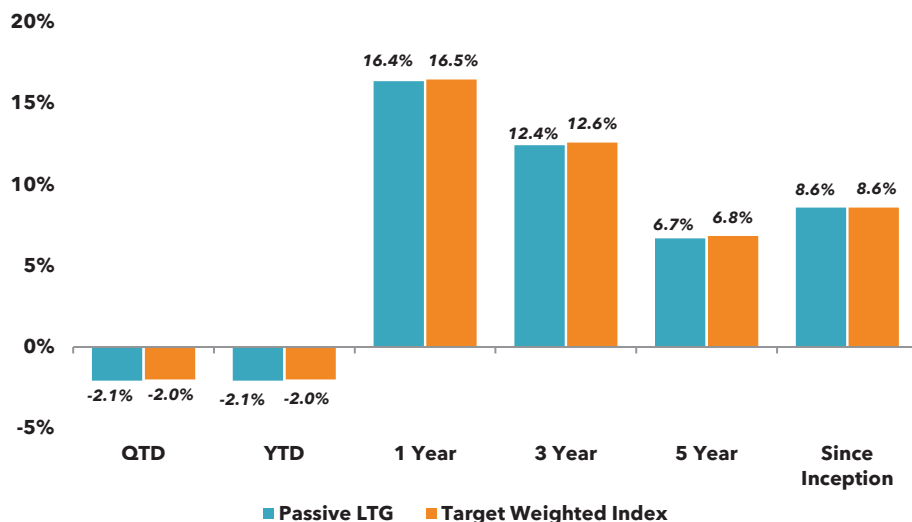
TARGET ALLOCATIONS



ANNUAL PERFORMANCE VS. BENCHMARK

	2026	2025	2024	2023	2022	2021	2020	2019	2018	2017
<b>Passive LTG</b>	-2.1%	18.7%	11.1%	16.2%	-15.6%	12.6%	12.6%	21.5%	-6.5%	16.4%
<b>Benchmark</b>	-2.0%	18.8%	11.2%	16.3%	-15.5%	12.8%	12.0%	22.1%	-7.0%	17.0%

RETURNS\* (AS OF MARCH 31, 2026)



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\*Net of investment fees. The weighted average benchmark is 46% Russell 3000, 21% MSCI EAFE, 8% MSCI EM, 25% Bloomberg US Aggregate. Inception Date: 07/31/2016

# PASSIVE LONG-TERM GROWTH POOL

Asset Allocation, Managers and Expenses



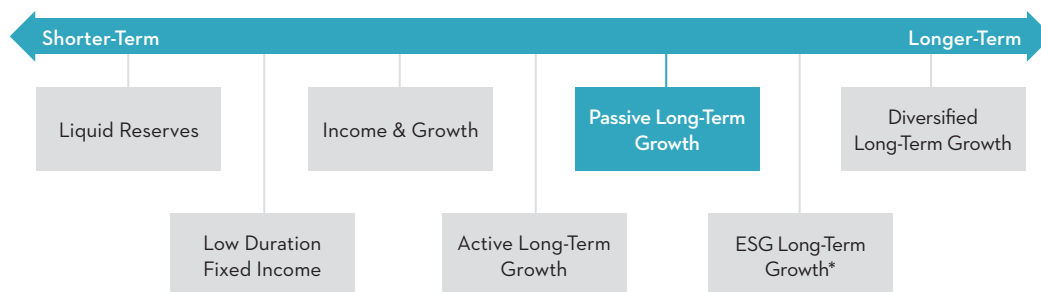
## GROWTH ASSETS

<b>US Equity</b> - SSgA S&P 500 Index - SSgA Russell 2000 Index	<b>46%</b>	<b>International Equity</b> - SSgA MSCI EAFE Index	<b>21%</b>
<b>Emerging Markets Equity</b> - SSgA MSCI Emerging Markets Index	<b>8%</b>		

## RISK REDUCTION ASSETS

<b>Fixed Income</b> - SSgA U.S. Aggregate Bond Index	<b>25%</b>		
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## ASSET STRATEGIES



Individual fund earnings may not reconcile to Foundation For The Carolinas' reported performance as a result of contributions, distributions and rebalancing in the fund. A successful investment program includes consideration of your grantmaking intentions and timeframe for investments. Past performance is not indicative of future results.

\*The ESG Long-Term Growth pool is currently available to FFTC fundholders only, with expansion to supporting organizations in the future.

### Expense Ratio\*\* 0.20%

\*\*Includes weighted Investment Manager fees, FFTC investment fee, and other investment-related expenses. Please note administrative fees are charged separately.

Administrative fee schedules are available on our website at [www.ffc.org/advisor\\_resources#administrative-fee-schedules](http://www.ffc.org/advisor_resources#administrative-fee-schedules).