



Cobb Community Foundation offers a variety of investment options through Wela Strategies in order to meet a range of philanthropic goals and time horizons. As a fundholder, you may establish your target asset allocation using any combination of the strategies reflected below and may adjust that target at any time. In the meantime, your fund will be rebalanced periodically.

All pools benefit from purposeful asset allocation and diversification. Wela's experienced investment committee and advisors monitor investments regularly to achieve the highest returns within an acceptable level of risk.

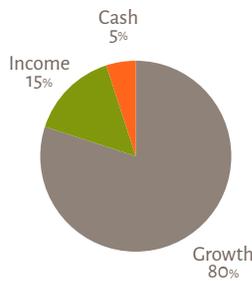
INVESTMENT OPTIONS

BY *Wela*

STRATEGY DETAILS

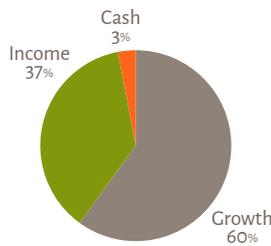


AGGRESSIVE GROWTH STRATEGY



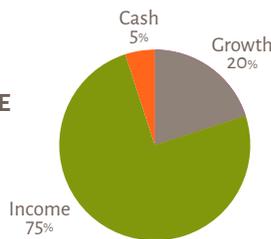
This strategy uses a diversified approach to achieve capital appreciation as it's main objective. It focuses on making strategic shifts within the allocations based on macroeconomic and fundamental factors. Within the equity allocation, the composite gains exposure to both domestic and international markets, along with strategically shifting among domestic sectors and market cap sizes. Within the fixed income allocation, we seek to make broader decisions between the domestic and international bond space. The strategy utilizes only ETFs. The composite is one that is geared towards an investor with a high-risk tolerance, as the strategy has the potential to be volatile.

MODERATE GROWTH STRATEGY



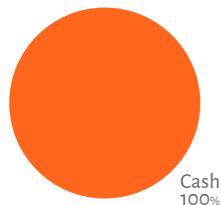
This strategy is geared towards capital appreciation, but with more concise exposure to the equity space and greater fixed income exposure. The allocation to growth is more general in its exposure to domestic and international investments, while the fixed income allocation is diversified among various areas of the bond market. The strategy also utilizes ETFs. Despite having a more diverse exposure to the fixed income space, this allocation can be volatile at times.

CONSERVATIVE GROWTH STRATEGY



The conservative growth strategy is designed for investors with a desire to earn income via a diversified income portfolio. Growth exposure is gained via broad, dividend-paying investments that gain exposure to both domestic and international markets. The fixed income allocation utilizes strategic shifts within the fixed income markets to determine exposures to different types of bonds. While there is risk present in the portfolio, this strategy is designed for investors with minimal ability and/or willingness to take on risk.

CASH INVESTMENT STRATEGY



The cash investment pool seeks little to no risk of principal loss through a combination of money market investments and other highly liquid, interest-bearing securities with short-term maturities.

Let's get started. Contact your financial advisor or the CCF team for more information.
Email CCFTeam@cobbfoundation.org or call 770.859.2366.

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