

BROAD ESG IMPACT POOL

Seeks to invest in best-in-class passive funds targeting leading social, environmental, and governance factors.

Weighted Average Fee¹

0.53% (53 basis points)

Objectives

Risk Profile: Aggressive

Strategy: The Broad ESG Impact Pool invests in organizations that tackle global challenges through commitments to environmental action, diversity and inclusion, and proper governance. This diversified portfolio of passive funds allows you to align your public investments with core ESG principles that support responsible companies and drive positive impact.

Impact: The Pool consists of a globally diversified mix of passive index funds and ETFs that:

Invest in companies developing solutions to improve resource efficiency and help combat climate change.

Screen Out companies that have poor governance, health, and humane safety standards as well as a lack of diversity at the board and executive level.

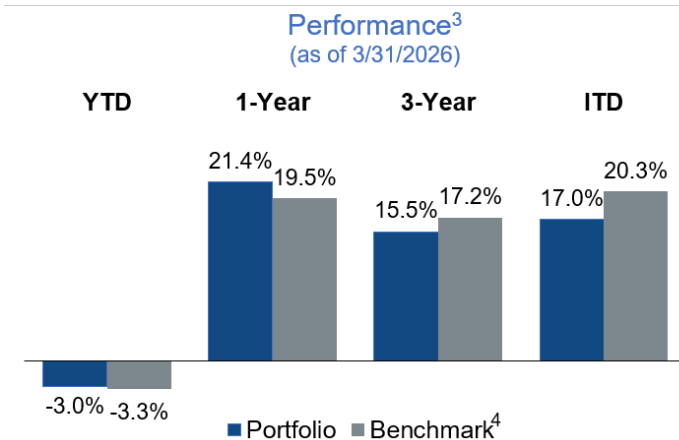
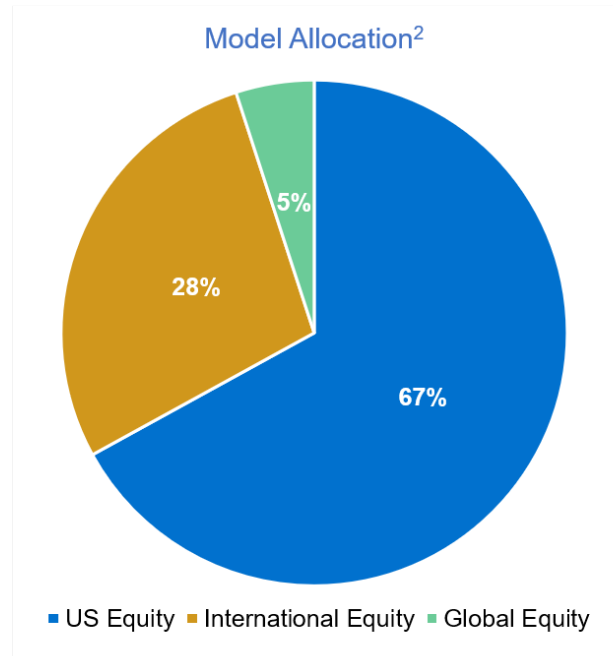
Select companies that treat their employees and suppliers fairly and take the lead in workforce equity and shrinking gender and racial pay gaps.

Engage with companies to improve how they treat employees, communities, and the environment.

Grantmaking: Appropriate for donors with long- and short-term time horizons for granting priorities.

Investments

Calvert US Large Cap Core Responsible Index
 Vanguard FTSE Social Index
 Calvert International Responsible Index
 Goldman Sachs JUST US Large Cap ETF
 iShares Global Clean Energy ETF



Customer Service

If you have any questions about your fund or wish to request a change in your investment mix, please contact Donor Services at support@greaterhorizons.org or 866.627.3440.

Contact Trey Corbett at corbett@greaterhorizons.org or 816.627.3419 for more information on the pools, including their component funds and blended benchmarks, the Board of Directors Investment Committee, or the Investment Policy Statement.

Disclosures

¹ The Weighted Average Fee includes the overall portfolio cost based on underlying fund expense ratios and their weighted allocations along with any investment advisory fees.

² Investment allocation tactical flexibility of +/- 10%. Actual allocation may fluctuate within these flexible bands intra-quarter due to market movements.

³ The performance figures for the time period are actual performance since the portfolio's inception (10/1/2022) net of all underlying manager fees. The performance does not account for the underlying investment advisory fee or the Greater Horizons charitable admin fees, trading costs or transaction costs associated with the management of the underlying portfolio. Performance of the Donor-Advised Fund's investments may be lower or higher.

⁴ The Benchmark is a 70% S&P 500 Index/30% MSCI World ex. USA Index blend.