

## ENVIRONMENTAL IMPACT POOL

Seeks to manage climate change risks, promote the transition to clean and renewable energy, and protect and conserve natural resources.

### Weighted Average Fee<sup>1</sup>

0.62% (62 basis points)

### Objectives

**Risk Profile:** Aggressive

**Strategy:** The Environmental Impact Pool invests in organizations that are best positioned to address and cope with rising climate risks. This diversified pool of passive equity investments allows you to align your investments with your charitable goals, invest in companies taking the lead in reducing their carbon emissions and conserving resources, and encourage leaders to adopt better environmental policies.

**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 heightened exposure to climate-related risks, focusing instead on those that are leaders in resource conservation.

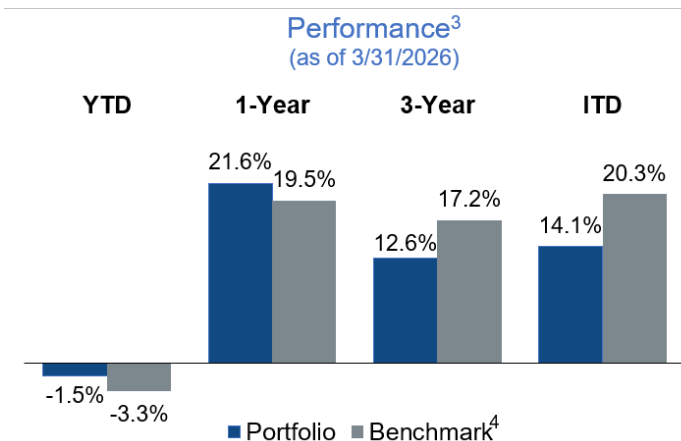
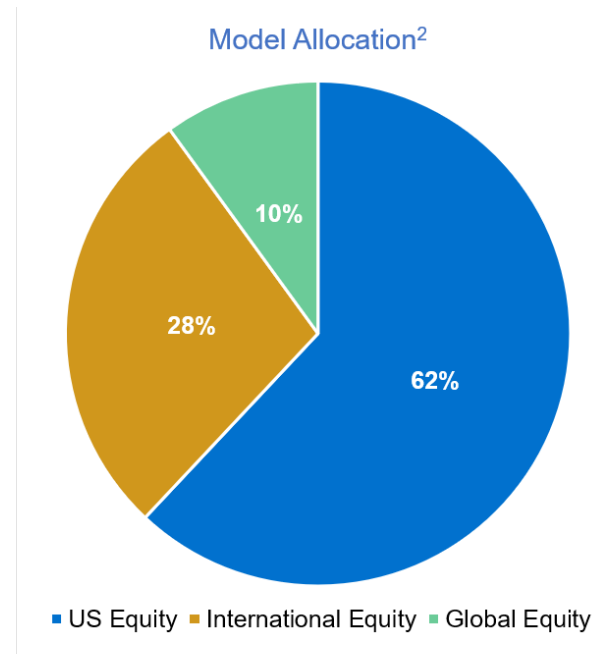
**Engage** with organizations to drive more environmentally responsible business practices, with a particular focus on greenhouse gas emission reduction.

**Fund** renewable energy and other critical infrastructure to reduce greenhouse gas emissions and conserve finite resources.

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

### Investments

Calvert US Large Cap Core Responsible Index  
 Etho Climate Leadership US ETF  
 DFA International Sustainability Core 1 Portfolio  
 iShares Global Clean Energy ETF  
 Invesco MSCI Sustainable Future 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](mailto:support@greaterhorizons.org) or 866.627.3440.

Contact Trey Corbett at [corbett@greaterhorizons.org](mailto: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.

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## Disclosures

<sup>1</sup> 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.

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

<sup>3</sup> 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.

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