Social Impact - Investment Performance Summary

As of 10/31/2026

Pool Performance	YTD	1 Month	3 Months	1 Year	3 Years	5 Years	10 Years
***Social Impact Pool TR**	**12.94**	**-1.66**	**-0.04**	**13.93**	**22.62**		
*Impact Benchmark	11.33	-0.66	0.64	12.93	22.67	11.23	13.70
S&P 500 (TR) (1970)	11.77	-0.87	1.48	12.11	23.40	12.06	15.44
MSCI World ex USA NR USD	9.96	-0.19	-1.33	14.44	20.54	8.98	9.46
Intermediate-Term Fixed Income Pool TR	**-0.78**	**2.50**	**-0.26**	**-0.15**	**5.94**	**0.43**	**1.82**
Intermediate-Term Fixed Income Benchmark	-0.89	2.44	-0.27	-0.17	5.96	0.50	1.90
Short-Term Fixed Income Pool TR	**0.77**	**1.53**	**0.36**	**1.62**	**5.15**	**1.80**	**1.99**
Short-Term Fixed Income Benchmark	0.81	1.57	0.39	1.64	5.19	1.88	2.08
Money Market Pool TR	**2.75**	**0.28**	**0.85**	**3.33**	**4.07**	**3.23**	**1.99**
USTREAS T-Bill Auction Ave 3 Mon	3.25	0.35	1.02	3.91	4.59	4.07	2.59

*Performance prior to 9/30/22 is pro forma.

Please refer to the Investment Performance Supplemental Report for pool holdings and benchmark definitions.

Social Impact Mix Performance	YTD	1 Month	3 Months	1 Year	3 Years	5 Years	10 Years
Aggressive Risk Social Impact Mix	**10.06**	**-0.85**	**0.01**	**10.99**	**18.54**		
Aggressive Risk Social Impact Benchmark	8.82	-0.08	0.53	10.21	18.58	9.08	11.10
Moderately Aggr Risk Social Impact Mix	**7.90**	**-0.24**	**0.04**	**8.80**	**15.46**		
Moderately Aggr Risk Social Impact Benchmark	6.93	0.35	0.45	8.19	15.50	7.54	9.15
Moderate Risk Social Impact Pool	**5.43**	**0.42**	**0.09**	**6.28**	**11.93**		
Moderate Risk Social Impact Benchmark	4.80	0.81	0.37	5.89	11.99	5.70	6.84
Conservative Risk Social Impact Mix	**3.09**	**0.99**	**0.18**	**3.87**	**8.39**		
Conservative Risk Social Impact Benchmark	2.83	1.19	0.34	3.75	8.50	3.97	4.52

Investment Mix options offer a simple, one-stop approach to an investment strategy that best reflects your charitable goals. Donors recommend one option, which Greater Horizons rebalances.

The Aggressive Mix, the Moderate Aggressive Risk, the Moderate Risk, the Conservative Risk and all Mix Benchmarks have an inception date of 9/30/22: performance prior to that date is pro forma.

Returns for periods greater than 1 year are compound annual returns.
TR = Total Return

Current Investment Mix Allocations	Social Impact Pool	Interm-Term Fixed Income Pool	Short-Term Fixed Income Pool	Money Market Pool
Aggressive	77%	12%	8%	3%
Moderately Agg	60%	21%	14%	5%
Moderate	40%	30%	20%	10%
Conservative	20%	36%	24%	20%

Estimated Investment Management Fees for the Investment Mix Options

Aggressive	0.43%
Moderately Aggressive	0.35%
Moderate	0.25%
Conservative	0.16%

Performance is presented gross of Greater Horizons' administrative fees but net of all investment management fees, brokerage, consulting and other transaction costs.

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.

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Environmental Impact - Investment Performance Summary

As of 10/31/2026

Pool Performance	YTD	1 Month	3 Months	1 Year	3 Years	5 Years	10 Years
***Environmental Impact Pool TR**	**10.78**	**-1.11**	**-1.24**	**12.14**	**19.67**	**5.43**	**11.68**
*Impact Benchmark	11.33	-0.66	0.64	12.93	22.67	11.23	13.70
S&P 500 (TR) (1970)	11.77	-0.87	1.48	12.11	23.40	12.06	15.44
MSCI World ex USA NR USD	9.96	-0.19	-1.33	14.44	20.54	8.98	9.46
Intermediate-Term Fixed Income Pool TR	**-0.78**	**2.50**	**-0.26**	**-0.15**	**5.94**	**0.43**	**1.82**
Intermediate-Term Fixed Income Benchmark	-0.89	2.44	-0.27	-0.17	5.96	0.50	1.90
Short-Term Fixed Income Pool TR	**0.77**	**1.53**	**0.36**	**1.62**	**5.15**	**1.80**	**1.99**
Short-Term Fixed Income Benchmark	0.81	1.57	0.39	1.64	5.19	1.88	2.08
Money Market Pool TR	**2.75**	**0.28**	**0.85**	**3.33**	**4.07**	**3.23**	**1.99**
USTREAS T-Bill Auction Ave 3 Mon	3.25	0.35	1.02	3.91	4.59	4.07	2.59

*Performance prior to 9/30/22 is pro forma.

Please refer to the Investment Performance Supplemental Report for pool holdings and benchmark definitions.

Pool Performance	YTD	1 Month	3 Months	1 Year	3 Years	5 Years	10 Years
Aggressive Risk Environmental Impact Mix	**8.39**	**-0.42**	**-0.92**	**9.60**	**16.33**	**4.64**	**9.56**
Aggressive Risk Environmental Impact Benchmark	8.82	-0.08	0.53	10.21	18.58	9.08	11.10
Moderately Aggressive Risk Environmental Impact Mix	**6.61**	**0.09**	**-0.69**	**7.71**	**13.78**	**4.09**	**7.95**
Moderately Aggressive Risk Environmental Impact Benchmark	6.93	0.35	0.45	8.19	15.50	7.54	9.15
Moderate Risk Environmental Impact Mix	**4.57**	**0.64**	**-0.40**	**5.55**	**10.84**	**3.36**	**6.00**
Moderate Risk Environmental Impact Benchmark	4.80	0.81	0.37	5.89	11.99	5.70	6.84
Conservative Risk Environmental Impact Mix	**2.66**	**1.10**	**-0.07**	**3.51**	**7.86**	**2.67**	**4.00**
Conservative Risk Environmental Impact Benchmark	2.83	1.19	0.34	3.75	8.50	3.97	4.52

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The Aggressive Mix, the Moderate Aggressive Risk, the Moderate Risk, the Conservative Risk and all Mix Benchmarks have an inception date of 9/30/22: performance prior to that date is pro forma.

Returns for periods greater than 1 year are compound annual returns.
TR = Total Return

Current Investment Mix Allocations	Envir Impact Pool	Interm-Term Fixed Income Pool	Short-Term Fixed Income Pool	Money Market Pool
Aggressive	77%	12%	8%	3%
Moderately Agg	60%	21%	14%	5%
Moderate	40%	30%	20%	10%
Conservative	20%	36%	24%	20%

Estimated Investment Management Fees for the Investment Mix Options

Aggressive	0.49%
Moderately Aggressive	0.40%
Moderate	0.29%
Conservative	0.17%

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Broad ESG Impact - Investment Performance Summary

As of 10/31/2026

Pool Performance	YTD	1 Month	3 Months	1 Year	3 Years	5 Years	10 Years
***Broad ESG Impact Pool TR**	**11.06**	**-2.52**	**-1.27**	**11.82**	**21.80**	**8.00**	
*Impact Benchmark	11.33	-0.66	0.64	12.93	22.67	11.23	13.70
S&P 500 TR USD	11.77	-0.87	1.48	12.11	23.40	12.06	15.44
MSCI World ex USA NR USD	9.96	-0.19	-1.33	14.44	20.54	8.98	9.46
Intermediate-Term Fixed Income Pool TR	**-0.78**	**2.50**	**-0.26**	**-0.15**	**5.94**	**0.43**	**1.82**
Intermediate-Term Fixed Income Benchmark	-0.89	2.44	-0.27	-0.17	5.96	0.50	1.90
Short-Term Fixed Income Pool TR	**0.77**	**1.53**	**0.36**	**1.62**	**5.15**	**1.80**	**1.99**
Short-Term Fixed Income Benchmark	0.81	1.57	0.39	1.64	5.19	1.88	2.08
Money Market Pool TR	**2.75**	**0.28**	**0.85**	**3.33**	**4.07**	**3.23**	**1.99**
USTREAS T-Bill Auction Ave 3 Mon	3.25	0.35	1.02	3.91	4.59	4.07	2.59

*Performance prior to 9/30/22 is pro forma.

Please refer to the Investment Performance Supplemental Report for pool holdings and benchmark definitions.

Broad ESG Impact Mix Performance	YTD	1 Month	3 Months	1 Year	3 Years	5 Years	10 Years
Aggressive Risk Broad ESG Impact Mix	**8.67**	**-1.51**	**-0.93**	**9.42**	**17.95**	**6.60**	
Aggressive Risk Broad ESG Impact Benchmark	8.82	-0.08	0.53	10.21	18.58	9.08	11.10
Moderately Aggr Risk Broad ESG Impact Mix	**6.85**	**-0.76**	**-0.69**	**7.61**	**15.02**	**5.61**	
Moderately Aggr Risk Broad ESG Impact Benchmark	6.93	0.35	0.45	8.19	15.50	7.54	9.15
Moderate Risk Broad ESG Impact Mix	**4.75**	**0.07**	**-0.40**	**5.51**	**11.65**	**4.36**	
Moderate Risk Broad ESG Impact Benchmark	4.80	0.81	0.37	5.89	11.99	5.70	6.84
Conservative Risk Broad ESG Impact Mix	**2.76**	**0.82**	**-0.07**	**3.50**	**8.26**	**3.17**	
Conservative Broad ESG Impact Benchmark	2.83	1.19	0.34	3.75	8.50	3.97	4.52

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The Aggressive Mix, the Moderate Aggressive Risk, the Moderate Risk, the Conservative Risk and all Mix Benchmarks have an inception date of 9/30/22: performance prior to that date is pro forma.

Returns for periods greater than 1 year are compound annual returns.
TR = Total Return

Current Investment Mix Allocations	Broad Impact Pool	Interm-Term Fixed Income Pool	Short-Term Fixed Income Pool	Money Market Pool
Aggressive	77%	12%	8%	3%
Moderately Agg	60%	21%	14%	5%
Moderate	40%	30%	20%	10%
Conservative	20%	36%	24%	20%

Estimated Investment Management Fees for the Investment Mix Options

Aggressive	0.42%
Moderately Aggressive	0.34%
Moderate	0.25%
Conservative	0.16%

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