

INVESTMENT OPTIONS

LONG-TERM

Long-Term Portfolio
5+ years

70% Equities / 30% Fixed Income

Intended to support long-term sustainability and future initiatives.

MODERATE

Moderate Portfolio
3-5 years

50% Equities / 50% Fixed Income

Balanced growth and stability for mid-term reserves, seeking growth while managing market volatility.

CONSERVATIVE

Conservative Portfolio
0-3 years

30% Equities / 70% Fixed Income

For near-term liquidity needs, emphasizing capital preservation and stability.

MONEY MARKET

Money Market Option
0-1 year

100% Money Market

Designed for capital preservation and near-term access. Minimal market risk exposure.

WHAT WE OFFER

Institutional-Quality Management

Access diversified portfolios and economies of scale typically available only to much larger organizations.

Complex Gift Acceptance

We accept cash, appreciated stock, real estate, bequests, and planned gifts — and handle all the details.

Trusted Local Stewardship

We are deeply rooted in SLO County — a community partner invested in the same region you call home.

INVESTMENT OVERSIGHT & GOVERNANCE

The Foundation's Investment Committee, composed of community volunteers with professional investment, legal, and nonprofit experience, is supported by Foundation staff and overseen by the Board of Directors. The Committee sets investment policy, establishes the asset allocation ranges for each strategy, selects and monitors the Foundation's investment manager, and reviews performance quarterly.



Pictured: Investment Committee

MERCER ADVISORS

Working within the guidance of the Foundation's Investment Committee, Mercer oversees day to day portfolio management and ongoing monitoring in alignment with the Foundation's investment policies. They bring deep experience partnering with community foundations and understanding the unique goals and fiduciary responsibilities that come with this work.

Rob Garcia (Chair)	CEO, Corvus Wealth Advisors
Jim Black	Business Owner; Former Nonprofit Executive Director
Wayne Lewis	Investment Advisor, Lewis Financial
Lyle Meek	Founding Partner, Cerro Pacific Wealth Advisors
Carrie Miller	Partner, Trellis Wealth Advisors
Anita Robinson	Retired; Former Bank CEO
Bern Signsen, M.D.	Retired Physician
Linda Somers Smith	Partner, AMMCG Law



Let's start a conversation.

We're here to listen to your goals and help determine the fund structure that best fits your needs. Contact us at donorservices@cfsloco.org or call 805-543-2323.