



THE SPARTANBURG COUNTY FOUNDATION
Your Community Foundation

INVESTMENT POOL SELECTION
Frequently Asked Questions

What investment pool options are available?

Fundholders may choose from the following three pooled investment options:

1. Growth Pool
2. Moderate Pool
3. Money Market Pool

The three investment pool options identified above represent the only investment options available at this time. The Spartanburg County Foundation cannot accept individualized investment allocations to specific asset classes or fund managers within these pools.

If I am happy with my current investment allocation, do I need to contact the Foundation?

No, your allocation will not change without your authorization.

May I participate in more than one investment pool?

Fundholders may elect to be invested in more than one investment pool. Allocations between pools must be percentage-based (i.e., 75% growth, 25% moderate).

Are dollar-amount based allocations accepted?

Investment pool allocations must be percentage-based, as dollar-amount based allocations cannot be accepted.

How will my contributions be allocated?

All donor contributions, grants, administrative fees, and investment earnings/losses will be allocated between investment pools, based on the percentages allocated to each pool.

Is there a minimum fund balance required?

No minimum fund balance is required for opting into a different investment pool.

Can my allocation be moved in multiple tranches?

Fund balances greater than \$1,000,000 may be allocated in tranches up to four consecutive quarters. Movements must be percentage based only.

How often may I change my investment options?

Upon request by a donor, investment options may be changed one time within a 12-month period. Initial pool selection, and subsequent change requests must be made in writing by completing a SCF Investment Change Request form. The form must be signed by the appropriate authorized member(s) of the Awards Committee of the fund.

When will my change become effective?

Investment Change Request forms received by the 20th day of the month will be made effective the first day of the subsequent calendar quarter (January, April, July, October), subject to liquidity requirements. All changes must be requested using the SCF Investment Change Request Form.

When do pool selections become available?

Donors can begin pool selections beginning July 1, 2021.

When will my new allocation be funded?

Our goal is to have the new Growth Pool funded no later than October 1, 2021.

What is the investment default?

The investment default for those already invested in the current stock market pool will be the Moderate Pool. Fundholders must opt into the Growth Pool.