



<b>POLICY:</b> Investment	<b>NUMBER:</b> 3.01	<b>PAGE:</b> Page 1 of 1
<b>CATEGORY:</b> Finance		
<b>APPROVED:</b> October 7, 2014 TWF - Sept. 11, 2017	<b>REVISED/REAFFIRMED:</b> February 8, 2021	<b>SUBJECT TO REVIEW:</b> February 2023

The Winkler Community Foundation (WCF) holds endowment, restricted and unrestricted funds for investment and administers flow through funds on behalf of other charitable organizations. The two guiding principles in determining how the Winkler Community Foundation invests funds are:

### 1. RISK TOLERANCE

The investment portfolio must be structured in such a way as to maximize investment return while assuming an appropriate level of risk, as determined by the Winkler Community Foundation. The primary investment philosophy of Winkler Community Foundation is the safety of principal via limited responsible risk long term investments.

### 2. TIME HORIZON

The WCF funds will be held in perpetuity and therefore the investment portfolio must be structured and managed with a long-term horizon.

In order to best achieve these principles, the Winkler Community Foundation has pooled its endowments for investment purposes with the Winnipeg Foundation. As such, the Winnipeg Foundation Investment Policy has been adopted by the Winkler Community Foundation Board of Directors as its investment policy.