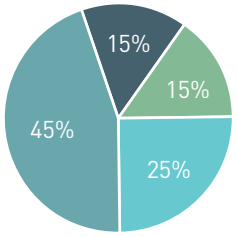
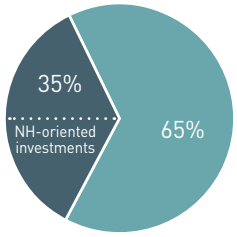
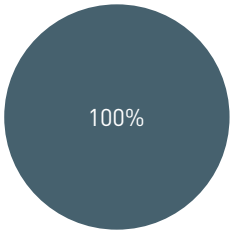
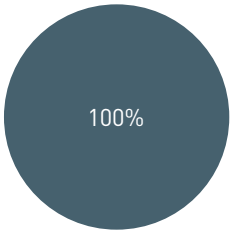
Investment options

We offer five investment options to meet your philanthropic goals:

NEW HAMPSHIRE CHARITABLE FOUNDATION

Investment pool	Long-term pool	Sustainable impact pool	New Hampshire impact pool	Short-term pool	Advisor-managed option
	Our core investment pool is designed to maximize long-term returns. We will be prioritizing work with investment managers whose practices are in alignment with the Foundation's purpose and values.	This pool integrates values of sustainability and impact and seeks strong financial returns over the long term. A portion of this pool will consist of investments that aim to have a positive impact in New Hampshire and surrounding states.	The intent of this pool is to benefit New Hampshire communities. These impact investments, which provide low-cost capital to community projects and organizations in New Hampshire, will produce below-market returns but promise significant local impact.[4]	For those who want liquidity for maximum short-term grantmaking flexibility, the short-term pool keeps your fund in cash or cash equivalents, such as money markets and certificates of deposit. The Foundation will identify investment opportunities that have a social impact focus.	Donors establishing funds of $250,000 or more may recommend their preferred investment advisor to manage the assets.
Total invested amount (as of 12/31/25)	$986 million	$66 million	$2.1 million	N/A	$102 million
Annual target return[1]	7% to 8%	6% to 7%	0% to 2%	0%	The time horizon, target returns, investment fees and asset allocation will be determined in consultation with the donor's investment advisor.
Estimated investment fees[2]	0.91%	0.34%	0%	0%	
Target asset allocation[3]					

[1] Return objectives are net of fees over full market cycles of ten years or more. Actual returns will fluctuate and losses may occur from year to year. Past performance may not be indicative of future results. Alternative investments such as hedge funds, private equity and real assets may be included to enhance returns, dampen volatility, and hedge against inflation.

[2] Estimated investment fees include third party investment management fees and and do not include the administrative fee charged by the Foundation. Expenses are subject to change in response to portfolio changes.

[3] Asset allocation is maintained through regular rebalancing.

[4] Donors must commit a minimum of $10,000 for 10 years to participate in the New Hampshire impact pool.

Performance summary[1]

NEW HAMPSHIRE
CHARITABLE FOUNDATION

	QTD[2]	Trailing 1-Year	Trailing 3-Years	Trailing 5-Years	Trailing 10-Years
Long-term pool	6.7%	14.5%	12.3%	6.3%	9.0%
Policy benchmark	7.8%	15.4%	14.6%	8.0%	9.7%
Sustainable impact pool	8.5%	13.6%	11.2%	6.5%	7.7%
Policy benchmark	9.9%	16.5%	14.2%	7.2%	8.9%

[1] Performance is reported net of investment fees
[2] 4/1/2026 – 6/30/2026