

Long-term Investment Account Performance

The Foundation invests the long-term portfolio in markets in primarily mature economies and accepts financial market volatility in the short term to achieve higher returns over a longer investment period.

Account performance as of December 31, 2016

- In 2016, the account earned 7.47%.
- For the trailing three years, the annualized return was 3.90%.
- For the trailing five years, the annualized return was 8.45%.

All three of these returns have been slightly better than our benchmark, demonstrating that we are on track. To read our Investment Policy Statements for both of our investment plans, visit:

* [Long-term Evergreen Investment Policy](#)

* [Short-term Bedrock Investment Policy](#)