

## **Long-term Evergreen Investment Account**

The Juneau Community Foundation manages the Evergreen portfolio for the long-term and ignores short-term market volatility for long-term gains. This fund does not use complex, opaque strategies, rather it is invested in index funds designed to replicate the developed markets.

*Account performance as of December 31, 2015*

- \* In 2015, the Evergreen earned -1.22%.
- \* For the trailing three years, the annualized return was 7.675%.
- \* For the trailing five years, the annualized return was 7.33%.

All three of these returns have been slightly better than our benchmarks. The benchmark for the Evergreen Account are outlined in our [Long-term Evergreen Investment Policy](#) .