

Investment Policy Statement

Family Trust Name

Date: [Insert Date]

Introduction

This Investment Policy Statement (IPS) outlines the investment goals, strategies, and parameters for the Family Trust, designed to guide the investment management of trust assets.

Trust Objectives

- Preservation of Capital
- Long-term Growth of Assets
- Income Generation

Investment Philosophy

The Family Trust seeks a balanced approach to investing that balances risk and return, prioritizing sustainable growth in alignment with the trust's values.

Asset Allocation

The target asset allocation for the Family Trust is as follows:

- Equities: 60%
- Fixed Income: 30%
- Alternative Investments: 10%

Investment Guidelines

All investments should align with the following guidelines:

- Investments must be diversified to manage risk.
- Investment in socially responsible options is encouraged.

Performance Review

The performance of the investment portfolio will be reviewed quarterly, with an annual performance report provided to the trustees.

Amendments

This IPS may be amended only by a majority decision of the trustees, with all amendments documented and communicated to all beneficiaries.

Signatures

_____ [Trustee Name 1]

_____ [Trustee Name 2]

_____ [Trustee Name 3]