

Investment Policy Statement

For [Nonprofit Organization Name]

Date: [Insert Date]

1. Purpose

The purpose of this Investment Policy Statement (IPS) is to establish a clear understanding between the Board of Directors and the Investment Committee regarding the investment goals and objectives of [Nonprofit Organization Name].

2. Governance

The investment of funds shall be managed by the Investment Committee under the authority of the Board of Directors.

3. Investment Objectives

- To preserve capital while generating a reasonable return.
- To support the organization's mission by aligning investments with values.

4. Asset Allocation

The investment portfolio shall be allocated as follows:

- Equities: [Percentage]
- Bonds: [Percentage]
- Alternative Investments: [Percentage]
- Cash: [Percentage]

5. Investment Selection Criteria

Investments will be selected based on the following criteria:

- Quality of the investment.
- Alignment with the organization's mission and values.
- Risk profile.

6. Performance Review

The Investment Committee will review the portfolio performance on a [quarterly/annual] basis and report to the Board of Directors.

7. Policy Review

This Investment Policy Statement will be reviewed [annually/bi-annually] and amended as necessary.

Approved by:

[Name], Chair of the Board

[Date]