

Your Faith. Your Values. Your Legacy.

When you are inspired to share your blessings, we're here to build a giving plan aligned with Catholic values – and ensure that your intentions will be honored for generations to come.



CATHOLIC LEGACY
FOUNDATION OF ACADIANA
— Forever Faithful —

Mission

The Catholic Legacy Foundation of Acadiana serves donors in perpetuating a Christ-centered future through charitable giving and stewardship.

Vision

To lead, inspire, and empower donors to participate in the mission of the Church through legacy giving.

Values

- | | |
|------------------|-------------------------|
| † Stewardship | † Community |
| † Solidarity | † Faith-based Investing |
| † Aligned Values | † Transparency |
| † Collaboration | † Service |



Through our mission, we invite you to walk spiritual ground, doing service that's profound, compassionate, and perpetual. When you entrust your funds to CLFA, you are shepherded through faith-consistent investments managed by financial experts.

Strategic Investments for Mission-Driven Growth

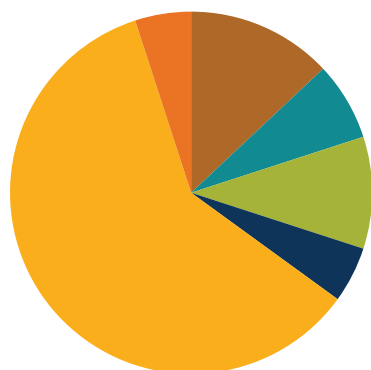
These customized investment models are built to align with your unique time horizon and financial goals, strategically optimizing asset allocation to balance risk and return. Each model is thoughtfully constructed to reflect the values and teachings of the Catholic Church, helping to maximize growth potential while managing volatility.

Faith-Driven Investment Models: Choose the Right Path for Your Goals

Short-Term Portfolio

1 - 3 Years

Ideal for Immediate Impact
and Flexibility
(Conservative)



Large Cap (U.S.)	13%
Small/Mid Cap (U.S.)	7%
Int'l Equity (Developed)	10%
Emerging Mkt Equity	5%
Domestic Fixed Inc.	60%
Other Real Assets	5%
Private Equity	0%
Private Debt	0%

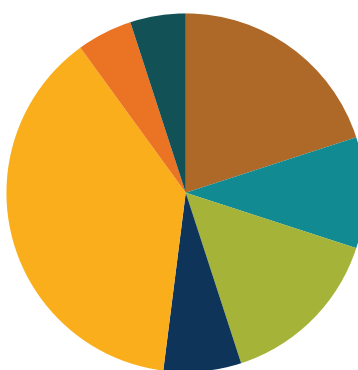
Expected Return 5.5 - 6%

Projected Downside Risk -9% to -13%

Mid-Term Portfolio

3 - 5 Years

A Balanced Approach for Sustained
Giving Over Time
(Moderate)



Large Cap (U.S.)	20%
Small/Mid Cap (U.S.)	10%
Int'l Equity (Developed)	15%
Emerging Mkt Equity	7%
Domestic Fixed Inc.	38%
Other Real Assets	5%
Private Equity	0%
Private Debt	5%

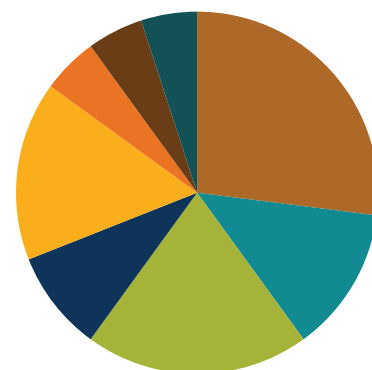
Expected Return 6 - 6.5%

Projected Downside Risk -14% to -18%

Long-Term Portfolio

5+ Years

Designed for Enduring
Philanthropic Growth
(Aggressive)



Large Cap (U.S.)	27%
Small/Mid Cap (U.S.)	13%
Int'l Equity (Developed)	20%
Emerging Mkt Equity	9%
Domestic Fixed Inc.	16%
Other Real Assets	5%
Private Equity	5%
Private Debt	5%

Expected Return 6.5 - 7%

Projected Downside Risk -19% to -23%

An ultra-conservative money market fund or cash & cash equivalent fund is also available in certain situations.

Glossary

Expected Return: The level of expected return from the Portfolio. The range of returns shown indicates the potential gain that an investor might expect each year, on average, over a 10-year period.

Projected Downside Risk: The amount of expected risk in the Portfolio is measured by the potential loss over a 12-month period that an investor might expect in the Portfolio, and is calculated via a statistical process consistent with 95% probability.

Contact Us Today

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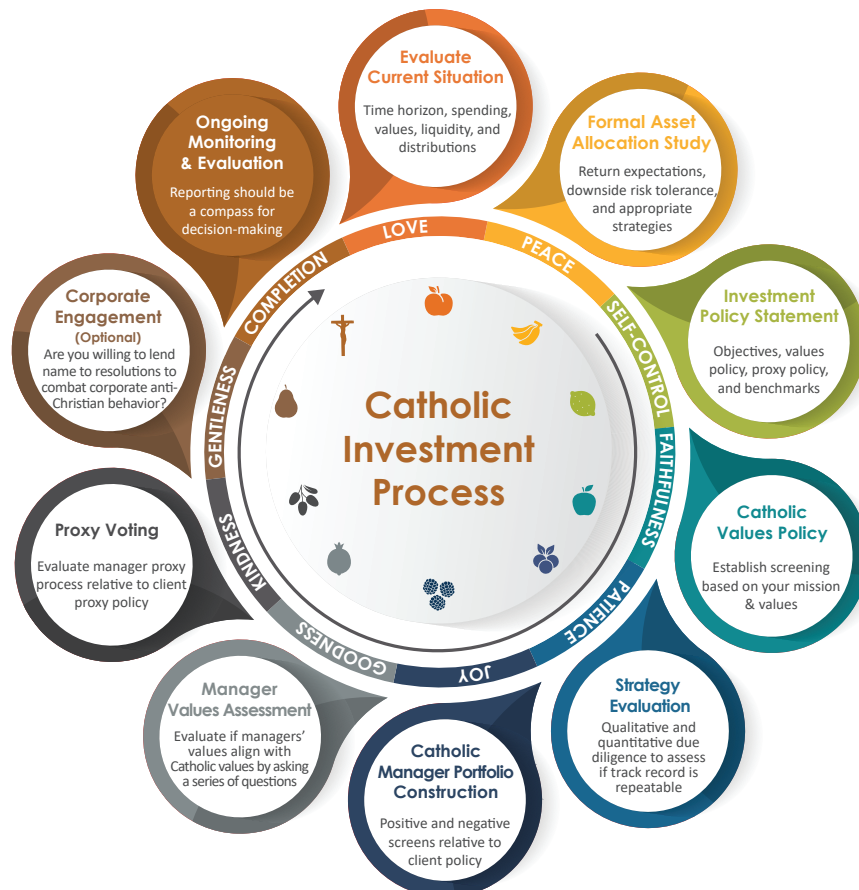
About Innovest

Innovest Portfolio Solutions is an independent investment consulting firm dedicated to serving institutions and families with a disciplined, research-driven approach. Rooted in fiduciary excellence and a commitment to long-term stewardship, they prioritize prudent risk management, transparency, and values-based investing. The firm upholds traditional financial principles, advocating for responsible capital allocation and strategies that align with the long-term interests of our clients. At Innovest, they believe in safeguarding wealth, promoting financial stability, and delivering customized solutions that reflect both fiscal responsibility and enduring values.

Faith is a foundational value at Innovest. We hired them to help us align our investments with Catholic teaching and the Foundation's values. Through their authentically Catholic investment process, they empower the Foundation to grow its resources while true to its mission and the Church.

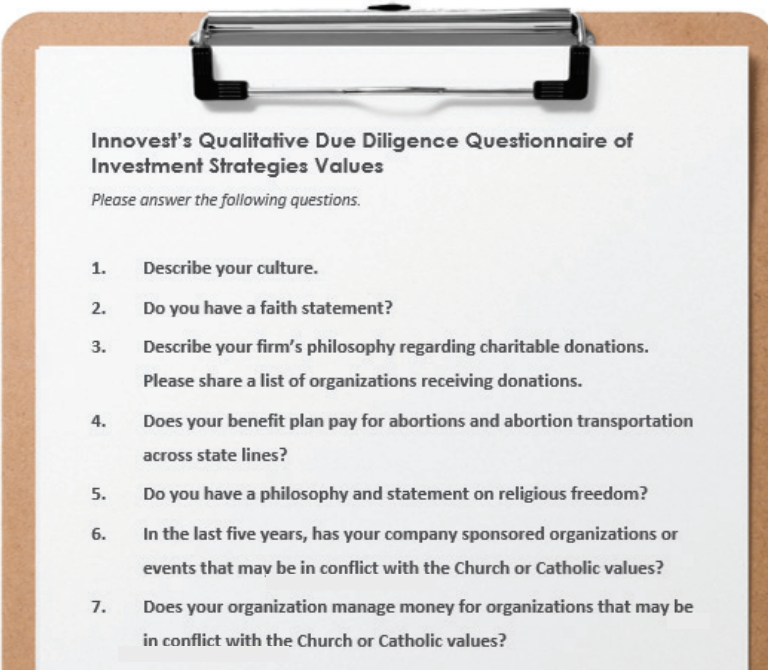
Innovest's Investment Philosophy

- Asset allocation is the fundamental driver of investment returns
- Risk reduction in portfolio design depends on diversification and a forward-looking capital markets assessment
- A focus on communication regarding the potential downside risk of a portfolio keeps investors from making emotional investment decisions
- Independent and conflict-free investment research that focuses on qualitative analysis drives better performance
- Qualitative investment strategy issues are often precursors to poor future performance
- Patient investors are typically rewarded
- Low-cost investment strategies that are consistent performers will add value in the long term
- Values alignment and portfolio value are not in conflict



Manager Values Assessment

Most Catholic institutional investments are managed by firms that have anti-Catholic values. Innovest screens managers to ensure that not only the portfolios but also the firms themselves are aligned with Catholic values.



Innovest's Qualitative Due Diligence Questionnaire of Investment Strategies Values

Please answer the following questions.

1. Describe your culture.
2. Do you have a faith statement?
3. Describe your firm's philosophy regarding charitable donations.
Please share a list of organizations receiving donations.
4. Does your benefit plan pay for abortions and abortion transportation across state lines?
5. Do you have a philosophy and statement on religious freedom?
6. In the last five years, has your company sponsored organizations or events that may be in conflict with the Church or Catholic values?
7. Does your organization manage money for organizations that may be in conflict with the Church or Catholic values?

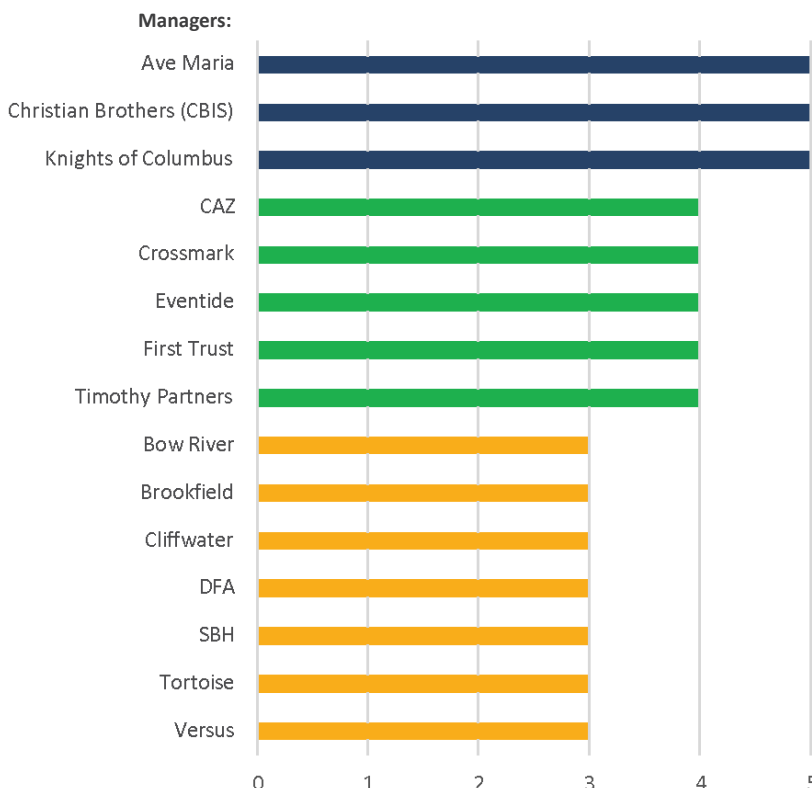
Innovest's Faith-Driven Manager Questionnaire

As part of the due diligence process, Innovest engages investment managers in a thorough evaluation to ensure their values align with Catholic teaching. They ask a series of targeted questions to assess their approach to key ethical considerations:

- Organization Culture
- Service to Others & Philanthropy
- Human Flourishing & Pro-Life Initiatives
- Religious Freedom
- Donation Practices
- Conflicts of Interest
- Custom Screening

Christian Values Alignment Assessment for Catholic Legacy Foundation of Acadiana

Portfolio Alignment Score: 3.80



Scoring	Description
5	Organization clearly driven by Christian values
4	Organization incorporates Christian values
3	Neutral organizational values
2	Anti-Christian organizational values
1	Aggressively anti-Christian organizational values

Values Alignment Over Time

Portfolio Alignment Score: 3.80

