

# CFSNM

## 5 YEAR RETURNS

# 2020

### Investment Returns

Endowment - 14%  
Intermediate - 10.10%  
Donor Advised Funds - 13.22%

# 2019

### Investment Returns

Endowment - 17.8%  
Intermediate - 13.12%  
Donor Advised Funds - 17%

First year to split Donor Advised Funds into their own separate fund. This increased transparency between multiple funds.

# 2018

### Investment Returns

Endowment - 5.43%  
Intermediate - 2.20%

# 2017

### Total Asset Returns

1.8%

Changed providers from Fund Evaluation Group to Vanguard. Reviewed and accepted new Investment Policy. At this time we were also managed by a larger community foundation group called Greater Horizons in which our assets were commingled with 33 other community foundations.

# 2016

### Total Asset Returns

1.3%

## 5 YEAR DISTRIBUTIONS TO FUNDS WITHIN CFSNM

2021 - 4%  
2020 - 5%  
2019 - 2%  
2018 - 3%  
2017 - 3%



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OF SOUTHERN NEW MEXICO

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