California COMMUNITY Foundation

July 2026

Dear Sir or Madam,

Thank you for your interest regarding the California Community Foundation's ("the Foundation") investment management. The Foundation uses an Outsourced Chief Investment Officer (OCIO), Cambridge Associates, to assist in establishing and implementing our Endowment Pool investment policy. Our contact is Wendy Walker in the San Francisco Office. The Foundation retains banking services at City National Bank.

As of June 30, 2026, the Foundation had total assets of approximately $2.70 billion. Of that total, $1.23 billion is related to the Endowment Pool. Endowment Pool assets are invested on behalf of the Foundation by outside managers, with the objective of preserving real purchasing power net of annual distributions for grants and expenses. (See investment policy statement).

Other significant asset groupings include the Capital Preservation Pool ($347.36 million), the Conservative Balanced Pool ($55.34 million), and the Social Impact Endowment Pool ($138.06 million). Cash balances, receivables, Trusts, separate accounts and annuity assets managed by outside parties, real estate and other assets comprise the remainder of total assets.

The Foundation's Charitable Asset Management Partnership (ChAMP) allows for external investment management of qualified funds. For more information, please see CCF's Champ homepage.

Endowment Pool investment decisions are made by Cambridge Associates, which welcomes manager information to be submitted via this portal. M/WBEs are encouraged to identify as such when contacting Cambridge Associates. The Foundation does not respond to unsolicited inquiries regarding banking services, investment management or third-party administration, custody services, or risk management/reporting analytics.

You can learn more about the Foundation and its activities at calfund.org.

Sincerely,

Erin Watkins
Chief Financial Officer

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For All

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