

IFFD FOUNDATION
JANUARY 2023

**ENDOWMENT
FUNDRAISING
CAMPAIGN
2020-2025**

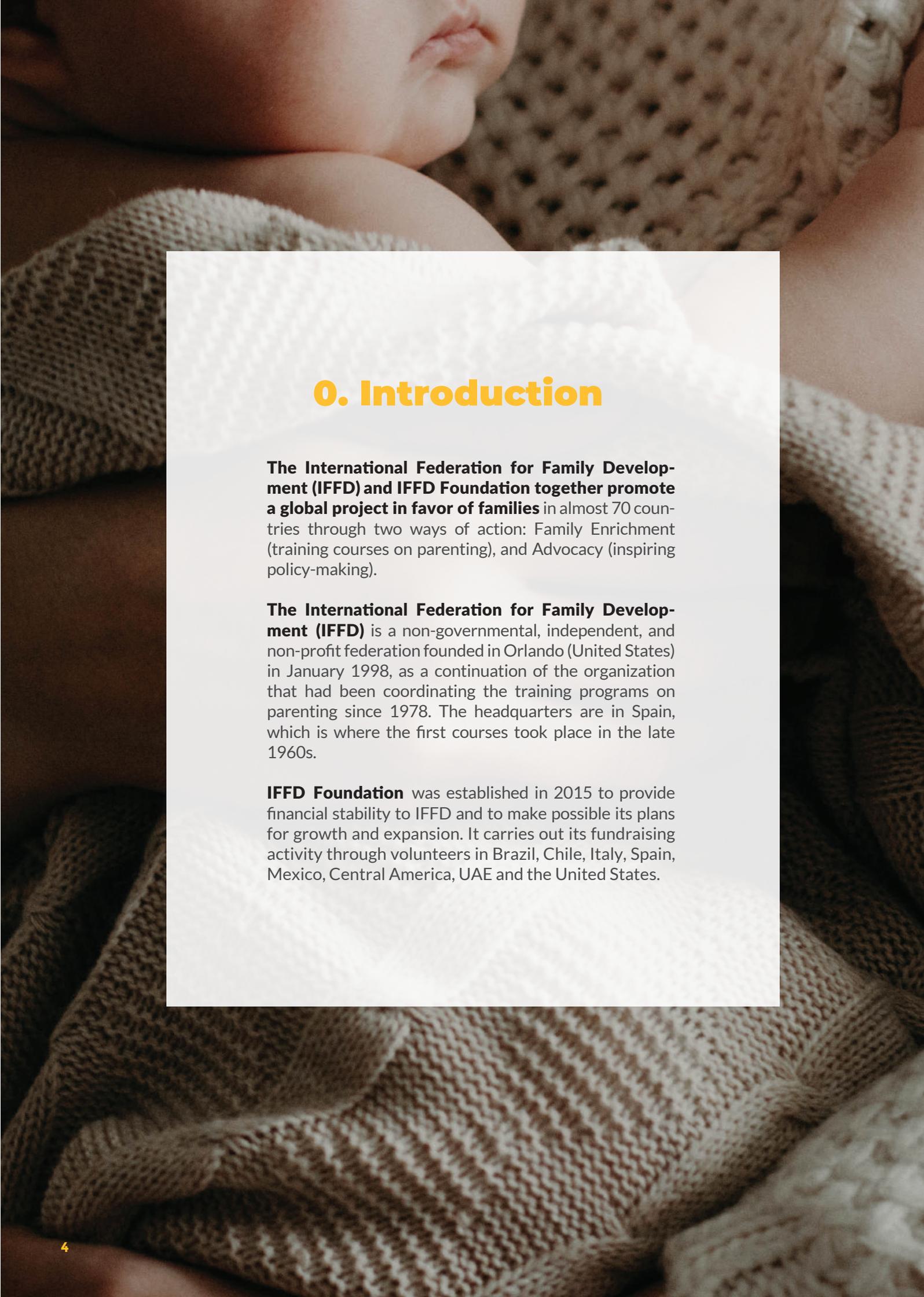


empowering families



Index

<u>0. Introduction</u>	<u>3</u>
<u>1. The IFFD Foundation Endowment</u>	<u>4</u>
<u>2. Investment Policy and Government</u>	<u>5</u>
<u>3. Return on the Investments</u>	<u>5</u>
<u>4. Evolution of the Endowment</u>	<u>6</u>



0. Introduction

The International Federation for Family Development (IFFD) and IFFD Foundation together promote a global project in favor of families in almost 70 countries through two ways of action: Family Enrichment (training courses on parenting), and Advocacy (inspiring policy-making).

The International Federation for Family Development (IFFD) is a non-governmental, independent, and non-profit federation founded in Orlando (United States) in January 1998, as a continuation of the organization that had been coordinating the training programs on parenting since 1978. The headquarters are in Spain, which is where the first courses took place in the late 1960s.

IFFD Foundation was established in 2015 to provide financial stability to IFFD and to make possible its plans for growth and expansion. It carries out its fundraising activity through volunteers in Brazil, Chile, Italy, Spain, Mexico, Central America, UAE and the United States.

1. The IFFD Foundation endowment

IFFD Foundation launched in 2020 a fundraising campaign aimed at establishing an endowment fund. The goal of this endowment is to provide financial resources to IFFD in order to make possible the growth and expansion needed to reach out to many more people all over the world, and to do it in a more effective way.

We live in a new time and the future has knocked on our door. With more than 50 years behind us, we are giving a new impetus to our project. On the one hand, we are implementing a **transformation process** advised by a consulting company, following a methodology of design thinking oriented towards innovation and digital transformation. This project seeks to generate new dynamics that help our users discover and experience the beauty of family life. Based on agile methodology as an effective management system for the organization, we are developing design thinking and technologi-

cal innovation that takes advantage of the talent of our moderators and participants, at the service of each family we work with. The objective is that each of the participants in our courses discover, personally and in their own way, the beauty and happiness of living a full family life.

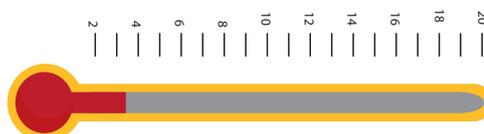
On the other hand, as mentioned above, we are carrying out a **fundraising campaign** in order to establish an endowment fund. The return provided by this endowment will allow IFFD to have the resources that are needed to enter this new phase, and will provide the necessary financial stability. The goal is to raise by 2025

\$20 MILLION

As of January 2023, the main donations have come from:



As of January 2023 we have raised \$3.4 million



2. Investment policy

The Board of Trustees of IFFD Foundation established in December 2019 an Investment Advisory Committee and entrusted it with the responsibility of managing the endowment fund of the foundation.

The members of the Investment Advisory Committee are:

- » **Martín Pich** (Chairman), CFA, Manager of a family office
- » **Javier Santomá**, Professor of Finance (IESE Business School)
- » **Jaime Puig**, General Manager of CVC Gaesco Gestión
- » **Ignacio Contreras**, Director at Stelac Advisory Services

Objective

The IFFD Foundation Investment Policy, approved by the Board of Directors, establishes as an investment objective to preserve the foundation's capital in the long term and to obtain, whenever it is possible, a return of 4-5 percentage points above the rate of inflation, measured as the prior 10-year average. The goal is to distribute 60% of the real return measured as the prior 4-year average.

Investment policy

» *Horizon*: the horizon for the investment is the long term, estimated as 10 years. The risk will be measured taking this horizon into account.

» *Asset allocation*: during the initial phase, while the endowment is under \$3 million, the asset allocation will be as indicated in the table, with the following caveats:

- » Each asset class may vary by +/- 10% (calculated over the total portfolio).
- » Most of the investment will be held in Euros, although the investment held in USD will be increased gradually as the endowment grows.
- » Passive instruments, such as ETF (Exchange Traded Funds), will be used.

Asset class	%
Equities (global)	70
Corporate fixed income, investment grade, maturity 6-8 years	30

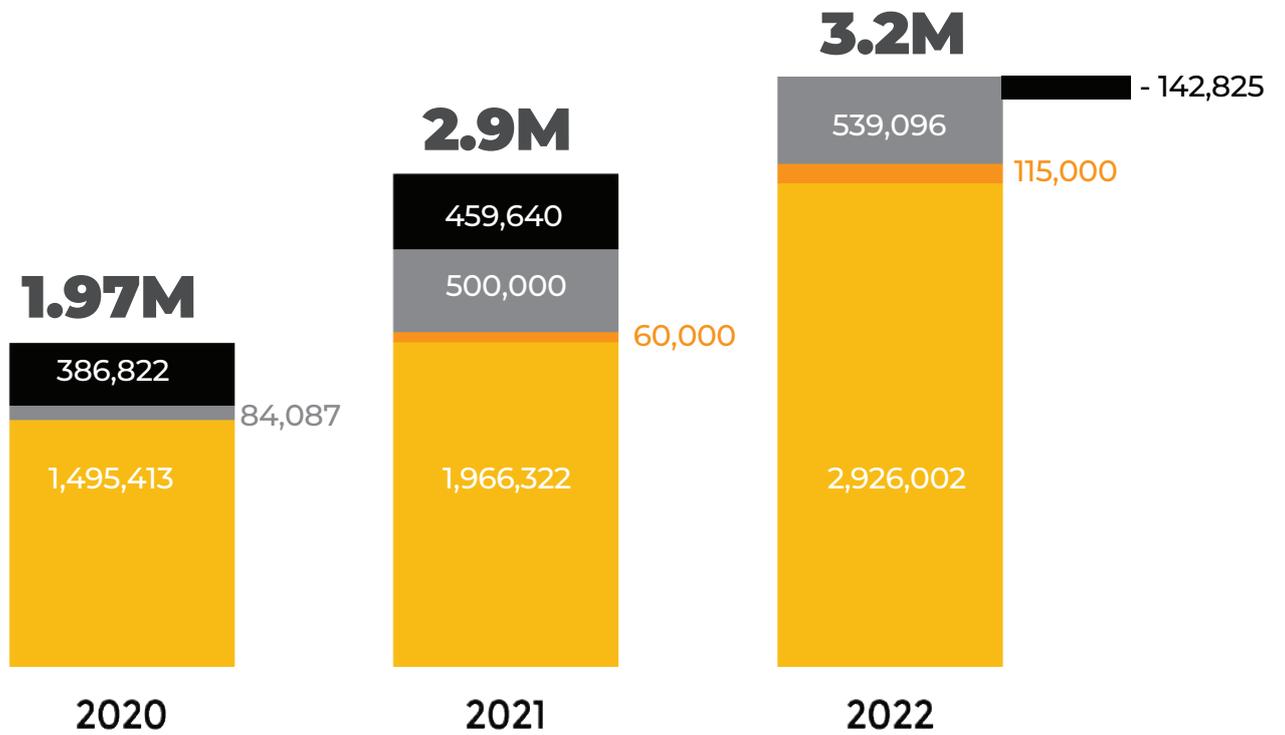
In the future, once the endowment has reached the amount of \$5 million, a new asset allocation will be elaborated

3. Return on the Investments



Year	Return
2020	23,05%
2021	25,90%
2022	-4,88%

4. Evolution of the Endowment (in Euros)



- Initial value of the endowment that year
- Amount distributed
- New donations received
- Return for the year



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www.iffdfoundation.org



empowering families



International Federation
for Family Development