

Viroqua Area Foundation Investment Information for Donors

General Overview:

The investment policies and practices of the Viroqua Area Foundation are designed to ensure prudent management of the Viroqua Area Foundation's assets in order to serve the long-term best interests of Viroqua and the surrounding areas. The Viroqua Area Foundation is a collection of individual donations from private citizens, other foundations, and organizations that, in aggregate, form a fund that will support the charitable needs of the communities it serves for generations to come. Investment policies are designed to provide an investment strategy developed to preserve the purchasing power of both principal and income in perpetuity. It is only through real growth in both principal and income that the fund will maximize its support of charitable activities over a longer time horizon. Investment policies were developed with the long-term interests of Viroqua and the surrounding areas in mind and adhere to accepted investment principles.

The Viroqua Area Foundation Board of Directors monitors and reviews the investment management of the assets of the VAF through its Investment Committee. This committee makes investment recommendations to the Board of Directors within the parameters of the Viroqua Area Foundation's Investment Policy Statement as established by the Board from time to time. Policies are available upon request.

Viroqua Area Foundation deposits are held in the following institutions:

Citizen's First Bank
State Bank of Viroqua

The Viroqua Area Foundation also has brokerage or mutual fund accounts with the following firms:

Raymond James Financial Services, Inc.