

Expression of Interest in a volunteer role with the Acorn Foundation Investment Advisory Committee



Thank you for your interest in the Acorn Foundation. The Acorn Foundation was founded in 2003 in the Western Bay of Plenty under the Community Foundations model that has existed for more than 100 years in North America. Community Foundations practice place-based philanthropy, and there are currently 17 foundations in New Zealand under our peak body, CFNZ.

Acorn's purpose is to connect generous local people with causes that matter in our local region. We have more than 400 donors, with nearly 350 who have set up endowment funds to benefit the community – many of them through a gift in a Will and others through a donation while they are alive so they can see their contribution in action.

Since Acorn's inception in 2003, the foundation has given away more than \$10M to charitable organisations or via scholarships and awards, with \$2M of that support coming in 2021. With a rapidly growing investment fund nearing \$60M, we anticipate gifting nearly \$3M this year. This funding has helped hundreds of charitable organisations that are important to our donors and vital to the well-being of the WBOP.

Acorn's Investment Advisory Committee plays an essential governance role in the development of the Statement of Investment Policy and Objectives ("SIPO") for the Acorn Fund, including the appropriate mix of asset classes and risk/return profile. It oversees the appointment of fund managers, the implementation of investment decisions and assists our staff in monitoring the Fund performance and compliance with the SIPO. The IAC ensures that all investments have appropriate due diligence and research.

In 2022, we are seeking one additional volunteer committee members to round out our hard-working, enthusiastic and involved existing committee of five members (2 Trustees and 3 investment professionals). Candidates should be familiar with the role of an Investment Committee in good investment governance, have knowledge across a range of investment asset classes (including alternatives) and ideally have relevant professional experience. Although our current volunteers are all based in the WBOP, we will consider applicants outside the region to find an ideal skill set.

Please fill out the form and return it along with a current CV and recent photo by 26 August 2022 to Acorn Foundation CEO, Lori Luke, at lori@acornfoundation.org.nz. We will be creating a file for each person who provides an expression of interest to build our pipeline of passionate, talented volunteers. Feel free to call the office at 07 579 9839 with any questions about our process.

Name	
Address	
Mobile Phone	
Email	

Employer	
Job Title/Vocation	
Location	

The Acorn Community Foundation benefits from having staff and volunteers who represent the local community. Our aim is for our governance and management to be supported and enhanced by people with different backgrounds and interests, to ensure that we have a depth of experience and a diversity of perspectives that will benefit Acorn. Please help us by providing the following optional information:

Ethnicity	
Age	
Personal interests	

1) Describe your background in the investment space.

--

2) What governance skills would you bring to Acorn?

--

3) Describe how the Investment Advisory Committee can add value to Acorn's purpose

--

4) Why are you interested in volunteering with Acorn?

5) What do you see as the major challenges facing the Acorn Foundation over the next several years?