Economic Update – Looking Ahead in 2023 and Beyond: Key Implications for Portfolio Design

Use this worksheet for today's presentation and workshop.

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1. **Why are you here? (circle all that apply)**
   a. I help manage my organization's operating reserves.
   b. I help manage my organization's endowment/foundation.
   c. I help manage my organization's retirement plan.
   d. I have an interest for my personal investments.
   e. I am here to learn.

2. **What is your timeframe for the assets you manage?**
   a. 0-1 years
   b. 1-3 years
   c. 3-5 years
   d. 5-10 years
   e. 10+ years

3. **What is your comfort with downside risk? (Downside risk is the 1 in 20 chance of a one-year loss; the longer the timeframe, more risk is recommended)**
   a. – 0%
   b. – 5%
   c. – 10%
   d. – 15%
   e. – 20%

4. **Are you currently utilizing alternative investments?**
   a. Yes
   b. No
   c. Unsure

5. **Where did my dad work as CFO for 20+ years?**
   a. Young Life
   b. America's Christian Credit Union
   c. Christian Care Ministries
   d. Focus on the Family

Thank you so much for joining me today! If you have any questions about today's content or your portfolio, please reach out to me at nrimington@innovestinc.com or (303) 694-1900 ext. 350.

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