



OBJECTIVE

To provide for growth above the risk free rate in a diversified investment portfolio with the maintenance of prudently acceptable risk.

POLICY

Applies to: All university personnel responsible for the investment of deferred compensation plan funds.

Issued: 02/2008

The preferred investment vehicle used in the Deferred Compensation Plans will be index mutual funds designed to replicate the return of the overall equity and fixed income markets at a low cost. The responsibility for investment of these funds is with the Office of the Treasurer.

This asset allocation will be reviewed on a periodic basic and revised as market conditions dictate.

PROCEDURE

Applies to: All university personnel responsible for the investment of deferred compensation plan funds.

Issued: 02/2008

The Deferred Compensation Plans are designed to be intermediate to long-term in nature and thus the asset allocation is designed to be as follows:

| Asset | Range |
|--------------------------------|--------------|
| Domestic Equities | 30-50% |
| International Equities | 10-25% |
| Domestic Fixed Income | 10-30% |
| Inflation Protected Securities | 10-20% |
| High Yield Fixed Income | 0-10% |
| Real Estate Investment Trust | 0-10% |
| Money Market | 0-10% |



RESOURCES

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