

1XUVLQJ (GXFDWLRQ

/LQNLQJ ,QG XVWU\ WR 1XUVLQJ (GXFDWLRQ /,1()XQG
SURYLGHV WKH RUSFWXVXQGLYWWUWHWFLDYWFKXQGRU
HYHGRROODU FRQWULEXWHG WR DQ LQVWHWXVGRQ E\ D KH
SURYLGHVWDBRROODUPDWFK WR WKH SDUWFLFLSDWLQJ LQV
DYDLOD(DFLXWQLYHUVLW\ VKDOO DGRSW UHJXQDWLRQV IR
SURJUDREHOLJLEOH

,QVWLWXWLRQV PXVW KDYH D QXUVLQJ HGXFDWLRQ S
ILUWPH SDVVDJH UDWL RQ WKH 1DWLRQDOLRQXQFLO
/LFHQVLQJ ([DPLQDWLRQ RI DW OHDVW SHUFHQW IR
E,GHQWLILHG KHDOWKFDUH SDUWQHUV PXVW EH D KHD
VFWLRQ)ORULGD 6WDWXWHV
F*LIW IXQGV DQG PDWFKLQJ IXQGV RFDREZHLQJHG RRUGHU
DGYDQEFKXQDOLW\

,QVWLWXWLRQV DZDDGEGZKRI(FKRGHJWR XVH /,1(IX
IRU VFKRODUVRLSVDZDUG VFKRODUVKLSV WR HQUR
VWXGHQWV ZKR PHHW WKHQVVLGHDFWWRQXLUHP

7KH %RDUG RI *RYHUQRUV ZLOO DZDUG WLVW DRW IXQG
HDFK SURSRVDO
/,1(XQGV EH DZDUGHG FRQP ID ILLUWHG EDVLV
\$ZDUG PRXQVVEH SURUDWHG GHSHQGLQ \$SRUR WKHG QX
SURSRVDO GRRODUVDI PRXQVWHG

H(DFK LQVWLWXWLRQ ZLWK DQ DSSURYHG SURSRVDO V
*RYHUQRUV XSRIQ WGHV HSLSRWLVGH HEDOWKFDUH SDUWQH
LGHQWLILHG LQ WKH SURSRVDO 7KH %RDUG RI *RYHU
JUDQW IXQGV IRORODGRWEDVLV XS WR WKH DPRXQW R
E\ WKH LQVWLWXWLRQ VXEMHFW WR IXQGV DYDLODEL

I \$QQD\ E\)HEUXDU\ HDFK LQVWLWXWLRQ DZDUGHG
SUHYLRXV ILVFDO \HDU VKDOO VXEPLW D UHSRUW WR
GHPRQVWUDWHV WKH H[SDQVLRQ DGRXWLVWLVH
XVH RI DOOQKQGLQJ FRQVWLEKLVWLVH QVSRUW
PXVW EH LQ WKH IRUPD&K \$QMSDUREU GPXPWWKH
UHSRUW PXWKLQFOOBLQURUQHHSRSDURQ
GLVDJJUHJDWHG E\ GHJUHH OHYHO

7KH QXPEHU RI DGGLWLRQDO QXUVLQJ HGXFDWLRQ
7KH QXPEHU RI VWXGHQWV ZKR UHFHLYHG VFKRODU
DZDUG DLRXVFKRODUVKLSV ZHSURDJUDGG XVLQJ
7KH RXWFOPXUWRQXGHQWRDWHGSRUWHG E\ WKH)ORU
7DOHQW 'HYHORS PHQW &RQW ERQ SXUYO BQWDR
6WDWXWHV

3UHSSLQJ ,QVWLWXWLRQV 3URJUDPV (PSOR\HUV DQG
,QFHQWLYHV IRU 1XUVLQJ (GXFDFWRUVLVWLVH)XQGV
IXQGVQXDOO\ VXEMHFVE DWHGSSQVSKLQWPERBU RI QXUVLQ
FRPSOHWHUV DQG 1&/(;)XQGVDDZDUGVYHUVLWLHV E\ WK
OHJLVWLVH WKEV\SEHRJURPH IRORFDZLHSPVSRVHV
LQFOXGLQJ EXWVQVGHQVWLWFKRORUQVLSVHWHFQWLVLRQ
IDFXOXVFKDVLQJ HUXLVSDHGHQVLDWLQJ RLVXSGDWLRQ
FHQWLVQGV PD\ QRMGEHRU FRQVWUXFWLRQ RI QHZ EXLOGL
D\$QQXDOO\ E\)HEUXDU\ HDFK LQVWLWXWLRQ DZDUG
SUHYLRXV ILVFDO \HDU VKDOO VXEPLW D UHSRUW WR
UHJDUGLQJ WKH RXWFRPHV RI QXUVLQJ VWXGHQWV H
)ORULGD 7DOHQW 'HYHORS PHQW &RQW ERQ SXUYO BQWDR
6WDWXWHV WHSRUW PXVW EH LQ W&KDIQVHPOVRSUHVFUL

ODVVIMUHJUHH 3URJUDPV\$QQ \$NRVRODO 6WDWH
8QLYHUVLVW\ 6\VVWVFXVQVGHQVWLWFKRORUQVLSVHWHFQWLVLRQ
SURJUDPVQVFXVQVFRWKH %RIDRGYHURRUVSSEHRDQDQ\
VXFK VVSHQVLRQ RURVFXVQVDDVSRQSRDADO PXVW SURYLG
VXILFLHQVHIDQV LQIRUPDWLRQ DQG MXVWLILFDWLRQ D
VXVSHQVHGRUQVGHQVLRQDO LQIRUPDWLRQ PD\ EH UHTXH
&KDQFHORU

\$XWKRULW\ 6HFWLQD &RQVW 6HFWLRQV
)ORULGDW XWVWRVHIZ ±UHJXODWLRQ