





A Preview of the Online AV Venture Planning Tool

Our non-binding online worksheet can walk you through your options and create a customized venture investment plan that you can review and consider with your advisors and/or with our customer service team.



1. Review your existing investments.






Planning Steps

- 1 | Existing Investments
- 2 | Choose Your Budget
- 3 | Core Fund Plan
- 4 | Focused Fund Plan
- 5 | Syndications Plan
- 6 | Review Plan
- 7 | Review Plan with My Account Manager


Your Existing Investments

We believe that consistent annual investing is more important than average investment size per year.


Click Next to create your plan.



September 6, 2016
Date of First Investment



3
Total # of investments



\$5,143
Average Investment \$ Per Year

Start Planning Here >

2. Choose your budget.

Alumni Ventures

Planning Steps

1 | Existing Investments

2 | Choose Your Budget

3 | Core Fund Plan

4 | Focused Fund Plan

5 | Syndications Plan

6 | Review Plan

7 | Review Plan with My Account Manager

Forward 12-Month Venture Budget

Use the boxes below to select your total forward 12-month budget.

Most Common

\$75,000

Average

\$100,000

Diamond Club¹

\$500,000

Custom

\$0

Core Fund Allocation
Establish the base with our most diversified fund offerings.
~20-30 companies.
Our Alumni Funds and Foundation Fund, which are diversified by stage, sector, geography, and lead investor.

Enter Allocation:

\$50,000

Total % Allocated:

50.00%

Focused Fund Allocation
Supplement the base.
~20-30 companies.
Thematic, typically with a thesis focusing on a specific sector or stage.

Enter Allocation:

\$30,000

Total % Allocated:

30.00%

< Previous

Next >

3. Consider allocations to available core fund plans.

Core funds are constructed around university alumni communities.

Alumni Ventures

Core Fund Plan

Your Total Annual Allocation: \$50,000

Allocation Remaining: \$25,000

Planning Steps

1 | Existing Investments

2 | Choose Your Budget

3 | Core Fund Plan

4 | Focused Fund Plan

5 | Syndications Plan

6 | Review Plan

7 | Review Plan with My Account Manager

Yard Ventures

Harvard Alumni

~20-30 venture investments per fund vintage diversified by stage, sector, geography, and lead investor. Many of which will have an alumni connection.

\$25,000 Minimum Investment

\$25,000

Enter Allocation Amount

☒ Repeat Investment Annually.

☒ Auto-Reinvest Distributions.

Blue Ivy Ventures

Yale Alumni

~20-30 venture investments per fund vintage diversified by stage, sector, geography, and lead investor. Many of which will have an alumni connection.

\$0

Enter Allocation Amount

☒ Repeat Investment Annually.

☒ Auto-Reinvest Distributions.

< Previous

Next >

4. Consider allocations to available focused fund plans.

Focused funds are thematic and allow you to focus on an area of interest.

Alumni Ventures

Planning Steps

1 | Existing Investments

2 | Choose Your Budget

3 | Core Fund Plan

4 | Focused Fund Plan

5 | Syndications Plan

6 | Review Plan


7 | Review Plan with My Account Manager

Focused Fund Plan

If you have not yet invested in a Focused Fund, you will see our CIO Select Fund below which is exclusively for existing investors and is designed to "chase our winners".

Your Total Annual Allocation: \$30,000

Allocation Remaining: \$0

**CIO Select Fund**


\$15,000

Enter Allocation Amount

Ventures with significant traction
~20-30 venture investments per fund vintage. Thematic, typically with a thesis focusing on a specific sector or stage.
\$25,000 Minimum Investment

☒ Repeat Investment Annually?

☒ Auto-Reinvest Distributions?

**AI First Fund**

\$15,000

Enter Allocation Amount

A diversified fund investing in transformative software and hardware AI-native startups.

☒ Repeat Investment Annually?

< Previous

Next >

5. Consider allocations to available syndications.

Syndications are opportunities to invest in a single company, supported by our diligence.

Alumni Ventures

Planning Steps

1 | Existing Investments

2 | Choose Your Budget

3 | Core Fund Plan

4 | Focused Fund Plan

5 | Syndications Plan

6 | Review Plan

7 | Review Plan with My Account Manager

Syndication Plan

If you'd like to edit your allocation amount, return to step 2 on the navigation menu. Your prior responses will be saved.

Your Syndication Allocation

✓

\$20,000

Confirm Your Amount

These are investments into individual companies, not large diversified portfolios. Therefore, these types of investments come with a higher level of risk than other Alumni Ventures fund offerings (and the possibility of a higher reward as well).

Investors should be thoughtful about their allocations between all of our different fund types and manage their own risk appropriately. We believe in annual investing into large, diversified Core Fund portfolios. You can view a short overview explaining Syndications [here](#).

Syndication Frequency

To better serve your interests, please let us know how many syndications you'd like to receive by clicking one of the options below.

While we never know exactly when deals will come our way, we will do our best to accommodate your preferences.

Please make a selection.

Syndication Frequency:*

☐

None; I do not want to receive notifications about any syndication opportunities.

☐

Up to ~1 Syndication deal per quarter.

☒

Up to ~1 Syndication deal per month.

< Previous

Next >

Venture Allocation Planning with Alumni Ventures

Congratulations on taking an important step towards your long-term venture planning.

We have taken note of your responses. As a reminder:

- This planning tool is not legally binding.
- We will remove you from standard fund marketing emails. Instead, you will hear privately from your dedicated Account Manager approximately 2 months prior to the First Close of your selected investments, which will leave you enough time to finalize your decision and take advantage of fee reductions when applicable.
- You will continue to receive emails from your Account Manager keeping you informed on updates in your portfolio, and administrative emails related to taxes, distributions, investor reports, etc

You can update your plan at any time by going through the exercise again. Your previously submitted venture planning forms are available in your Investor Portal under "Documents and Statements" in the "Planning" section.

Please reach out to your Account Manager if you have any questions.

Forward 12-Month Venture Plan for

Date submitted: June 18, 2025

Category	Fund	Allocation	Additional Options
Core	Blue Ivy Ventures	\$25,000.00	Repeat Investment. Auto-Reinvest.
	Yard Ventures	\$25,000.00	Repeat Investment. Auto-Reinvest.
Focused	AI First Fund	\$15,000.00	Repeat Investment. Auto-Reinvest.
	CIO Select Fund	\$15,000.00	Repeat Investment. Auto-Reinvest.
Syndications		\$20,000.00	
Total Annual Allocation		\$100,000.00	

NOTE: Your custom commitment will be documented in email with your Account Manager following a phone conversation.

Your selections are compiled into a simple plan that you can consider on your own or discuss with our team.

Ready to build your plan?

Launch the Venture Planning Tool