

# DONOR-ADVISED FUND INVESTMENT SELECTION FORM



## INVESTMENT GUIDELINES

All donor-advised funds will have their first \$10,000 allocated to the Short-Term pool (100% money market investments) to preserve capital for immediate grantmaking. It is generally advisable to maintain at least two years of grantmaking capacity within the Short-Term pool.

Beyond the first \$10,000, you may select either or both of the following:

- \$1,000 minimum investment in one Federation Investment Pool
- \$1,000 minimum investment in our Jewish Values Fund (JLens)

## INVESTMENT ALLOCATIONS

### SHORT-TERM POOL

Shorter than 2 years; Preservation of capital; 100% short-term high-quality money market

Please Select One:

- Place the minimum of \$10K in Short-Term and the remaining balance in the investment pool choice below
- Allocate this amount to Short-Term \$\_\_\_\_\_ (Must be greater than \$10K) and the remaining balance to the investment choice(s) below
- Place total fund balance in Short-Term

If your total fund balance is above \$10,000 and you would like to select additional investment option(s), make your selections below:

### INVESTMENT POOLS (Please select only one, minimum \$1,000):

#### ESG INVESTMENT POOLS

Values-Aligned Investing: actively-managed investments which score higher on "ESG" factors (environmental, social, governance)

- Moderate-Term** ..... Amount: \$ \_\_\_\_\_  
2-5 years; income, with modest expectation of growth;  
diversified portfolio emphasizing bonds
- Long-Term** ..... Amount: \$ \_\_\_\_\_  
5+ years; Long-term growth, with likelihood of short-term  
fluctuations; diversified portfolio emphasizing global stocks

#### PASSIVE POOLS

Index Funds: no ESG factors used

- Moderate-Term, Passive** ..... Amount: \$ \_\_\_\_\_  
2-5 years; income, with modest expectation of growth;  
diversified portfolio emphasizing bonds
- Long-Term, Passive** ..... Amount: \$ \_\_\_\_\_  
5+ years; Long-term growth, with likelihood of short-term  
fluctuations; diversified portfolio emphasizing global stocks

### JEWISH VALUES STRATEGY - JLENS (minimum \$1,000)

You may choose one Investment Pool from section above AND the Jewish Values Strategy as long as each has a minimum \$1,000 investment.

Screens out companies not aligned with Jewish values and also includes shareholder advocacy.

- JLens** ..... Amount: \$ \_\_\_\_\_  
5+ years; Long-term growth, with likelihood of short-term  
fluctuations; portfolio of 300 large cap domestic stocks.

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## INVESTMENT ALLOCATIONS *(cont.)*

### ADDITIONAL OPTIONS

- I am interested in learning more about current impact loan offerings in which I may participate. These opportunities are separate from other investment allocations and are available to all fundholders regardless of fund balance
  
- My fund has more than \$500,000 and I am interested in working with an outside investment advisor to manage investments in my donor-advised fund. All investment recommendations are subject to approval of the Investment Committee in its discretion.

Notes:

Please refer to the [Investment Options Fact Sheet](#) for additional information on investment options. If you need further information, please contact the donor-advised fund team

The Investment Committee of the Federation provides fiduciary oversight and reviews the performance and management of the investment portfolio.

Low balance policy: If your cash balance falls below \$10,000, we may liquidate investments to maintain the minimum cash balance.

*I (we) have read the details of the Jewish Community Federation and Endowment Fund's investment options and I (we) understand that these investments are subject to market fluctuations and, notwithstanding this risk, it is my (our) recommendation that the assets in the account referenced below be invested as indicated.*

Fund Name \_\_\_\_\_

Fund Number \_\_\_\_\_

Fund Advisor \_\_\_\_\_  
Name (please print)

Date \_\_\_\_\_

Signature \_\_\_\_\_