

DONOR ADVISED FUND INVESTMENT SELECTION FORM



All Donor Advised Funds will have their first \$10,000 allocated to the Money Market Fund. Funds above this amount may be invested in one of our Investment Pools. The Federation may automatically replenish all Funds to a \$10,000 balance on a monthly basis. If you would like a higher cash balance maintained, please let us know.

If you are currently in the Money Market Fund (only), and your fund balance qualifies to invest in a Pool, you may recommend below which Pool you would like your money to be invested in. Your initial Investment Pool recommendation may be made at any time. Investment recommendations received by the 20th of the month will be implemented on the 1st business day of the following month.

Two times per year you will be able to make a change to your Investment Pool selection.

INVESTMENT	PERCENTAGE OR DOLLAR AMOUNT
MONEY MARKET FUND	_____
<i>POOLS (you may select one)</i>	
FIXED INCOME	_____
CONSERVATIVE GROWTH	_____
MODERATE GROWTH, PASSIVE	_____
MODERATE GROWTH, ACTIVE	_____
ENDOWMENT PROXY POOL*	_____
<small>*available to DAFs with a balance beginning at \$100,000. Requires a minimum of \$25,000 remain in Money Market Fund. Funds can only be moved to cash on a quarterly basis, so please consider your grantmaking needs for the next 3-6 months if you are choosing this option, and leave that amount in the Money Market Fund.</small>	

I (we) have read the details of the Jewish Community Federation and Endowment Fund's Investment Program 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 _____