

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) in order to preserve capital for immediate grantmaking.
- If your cash balance falls below \$10,000, we may liquidate investments to maintain the minimum cash balance.
- If the total balance of the fund is \$25,000 or more, the amount above \$10,000 can be allocated to one additional investment pool with a different time horizon/investment profile. Make your selections below:

INVESTMENT OPTIONS

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 pool choice below
- Place total fund balance in Short-Term

If your total fund balance is \$25,000 or more, choose ONE ADDITIONAL investment pool from the following 4 options:

CORE INVESTMENT POOLS

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

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

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 _____

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