

INVESTMENT RECOMMENDATION FORM

Please select one of the following three options for your Fund's investments:

Option 1: Community Foundation's Investment Pools

Option 2: Community Foundation's Investment Pools with an emphasis
on environmental, social and governance (ESG) factors

Option 3: Financial Advisor Managed Account

Return completed form to service@growyourgiving.org.

Name of Fund _____

Fund ID _____

☐ **Option 1:** The assets in the Fund will be invested in the Community Foundation's Investment Pools.

Select one mix from the options listed below, or create your own mix.

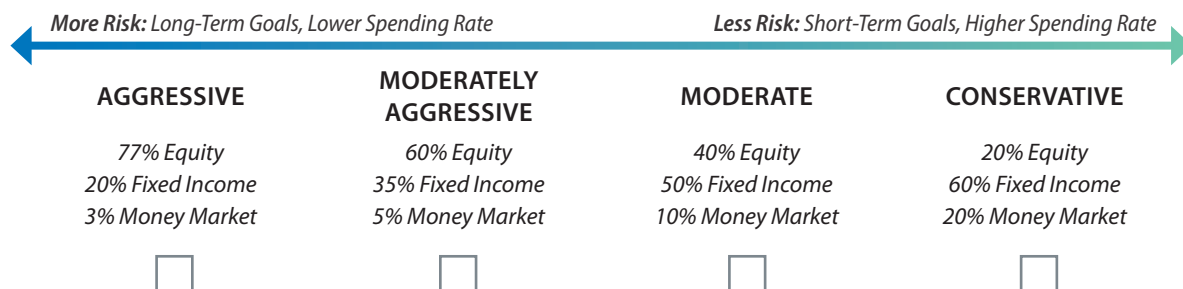
		MORE RISK Long-Term Goals Lower Spending Rate			LESS RISK Short-Term Goals Higher Spending Rate		
		AGGRESSIVE	MODERATELY AGGRESSIVE	MODERATE	CONSERVATIVE	RISK AVERSE	CUSTOM MIX*
Investment Pools	Mix Options ▶						
	Domestic Equity	52%	41%	27%	14%	0%	%
	International Equity	25%	19%	13%	6%	0%	%
	Intermediate-Term Fixed Income	12%	21%	30%	36%	0%	%
	Short-Term Fixed Income	8%	14%	20%	24%	0%	%
	Money Market	3%	5%	10%	20%	100%	%

*Combined total must equal 100%

☐ **Option 2: The assets in the Fund will be invested in the Community Foundation's Investment Pools with an emphasis on environmental, social and governance (ESG) factors.**

- ▶ If you wish to use a pre-selected investment mix, follow the two steps below.
- ▶ If you prefer to create your own mix, complete the Custom Mix table with the percentages of each pool you wish to include.

Step 1: Select your risk tolerance.



Step 2: Choose an ESG option for the equity allocation.

- ☐ **SOCIAL IMPACT**
The Social Impact Pool invests in organizations that are treating employees and customers fairly and are creating opportunities for the least advantaged. Additionally, the Pool focuses on investment managers from groups that have been traditionally excluded from the asset management industry.
- ☐ **ENVIRONMENTAL IMPACT**
The Environmental Impact Pool invests in organizations that are best positioned to address and cope with rising climate risks by reducing carbon emissions, conserving resources, and adopting environmental policies.
- ☐ **BROAD ESG IMPACT**
The Broad ESG Impact Pool invests in organizations that tackle global challenges through commitments to environmental action, diversity and inclusion, and good governance.

Additional information about the ESG Pools is available at www.growyourgiving.org/investing.

Or, build your own custom mix with ESG Pools.

CUSTOM MIX		
<i>Combined total must equal 100%</i>		
Investment Pools	Social Impact (70% U.S. Stock / 30% Foreign Stock)	%
	Environmental Impact (70% U.S. Stock / 30% Foreign Stock)	%
	Broad ESG Impact (70% U.S. Stock / 30% Foreign Stock)	%
	Domestic Equity (100% U.S. Stock)	%
	International Equity (100% Foreign Stock: 80% Developed Markets / 20% Emerging Markets)	%
	Intermediate-Term Fixed Income	%
	Short-Term Fixed Income	%
	Money Market	%



Option 3: The assets in the Fund will be invested separately in a Financial Advisor Managed Account on your financial advisor's platform. Your financial advisor will serve as the Fund's Investment Manager and will make investment selections for your Fund on your behalf. This option is available for funds with assets of \$100,000 or more.

The financial advisor named below will have online access to view your Fund information in the Community Foundation's portal, including balance, contribution and grant history. The Community Foundation will set up the investment account with the Investment Manager's firm.

A Fund Advisor, Successor Advisor or family member may not be named as the Fund's Investment Manager.

Financial Advisor Name	Firm Name		
Address	City	State	Zip Code
Phone	Email Address		

Communicating Grant Requests

With your permission, your financial advisor can communicate your grant requests to the Community Foundation.

☐

Check here to give your financial advisor permission to communicate your grant requests.

Terms & Required Signature(s)

If the Community Foundation does not receive an investment recommendation for the Fund, assets will be held in the Money Market Pool.

For assets in the Community Foundation's Investment Pools: Allocations are rebalanced to targets once a month. In the interim, cash coming into the Fund will be held in the Money Market Pool. The responsibility for managing the Community Foundation's investment program is vested in the Community Foundation's Board of Directors through its Investment Committee. The percentages in the mix options may change from time to time upon Investment Committee review. For additional details regarding investment mixes and pools, refer to www.growyourgiving.org/investing to view the Investment Performance Summary and the Supplemental Report.

For assets in a Financial Advisor Managed Account: The assets in the Fund will be managed directly by the named Investment Manager on a discretionary basis, until such time that the Community Foundation or the Fund Advisor(s) exercise(s) the option to make a different selection for management of this Fund. The named Investment Manager will manage the assets of this Fund in accordance with the Fund Advisor(s)' charitable objectives and the most current financial policies and standards of the Community Foundation, which can be found at www.growyourgiving.org/fap-guidelines. The Community Foundation will regularly review the financial performance of this Fund.

As required by IRS regulations:

- the investment recommendation is advisory only and the Community Foundation may, at its sole and absolute discretion, follow or decline to follow the recommendation;
- the Community Foundation may at any time, at its sole and absolute discretion, change the investment of all or any portion of the assets in the Fund;
- if the investment recommendation is accepted, the investments will be administered in accordance with the financial policies and fiduciary standards of the Community Foundation; and
- investments are subject to normal market and interest rate fluctuation risks, and any gain or loss generated by the above investments will be credited or charged to the Fund.

Signature	Printed Name	Date
Signature	Printed Name	Date