OPTION 2: INVESTMENT POOLS

To invest in the Community Foundation's investment pools, please select one investment mix from the options below, or create your own mix in the space provided. Asset allocation mixes offer a simple, one stop approach to an investment strategy that best reflects your investment philosophy and charitable goals

goals.		ng-Term Goals	-		Short-Tern	
	Risk Lov	wer Spending Rat			Higher Spendir	ng Rate Risk
Investment Pool	Aggressive	Moderately Aggressive	Moderate	Conservative	Short Term	Risk Averse
Money Market	0%	5%	15%	25%	35%	100%
Short-Term Fixed Income	10%	21%	27%	33%	65%	0%
Intermediate-Term Fixed Income	10%	14%	18%	22%	0%	0%

40%

20%

Money Market Pool

Equity Pool

Create Your Own Investment Mix

Intermediate-Term Fixed Income Pool

Combined Total Must Equal 100% ___

Short-Term Fixed Income Pool

0%

0%

%

%

%

%

As required by IRS regulation, I (we) acknowledge and agree that:

Equity

 a) the above recommendation is advisory only and the Community Foundation may, at its sole and absolute discretion, follow or decline to follow my (our) recommendation;

80%

60%

- the Community Foundation may at any time, at its sole discretion, change the investment of all or any portion of the assets in the fund;
- c) if my (our) recommendation is accepted, the investments will be administered in accordance with the financial policies and fiduciary standards of the Community Foundation; and
- d) 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.

Your Name	Your Fund's Name
Signature	Date