



LONG BEACH COMMUNITY FOUNDATION

INVESTMENT RECOMMENDATION FORM

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

Option 1: Long Beach Community Foundation Investment Pools

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

Option B: Financial Advisor Managed Account

Please return completed form to tara@longbeachcf.org.

Name of Fund _____

Fund ID _____

Option 1: The assets in the Fund will be invested in Long Beach Community Foundation's (LBCF) Investment Pools. Select a mix from the options listed below, or create your own mix.

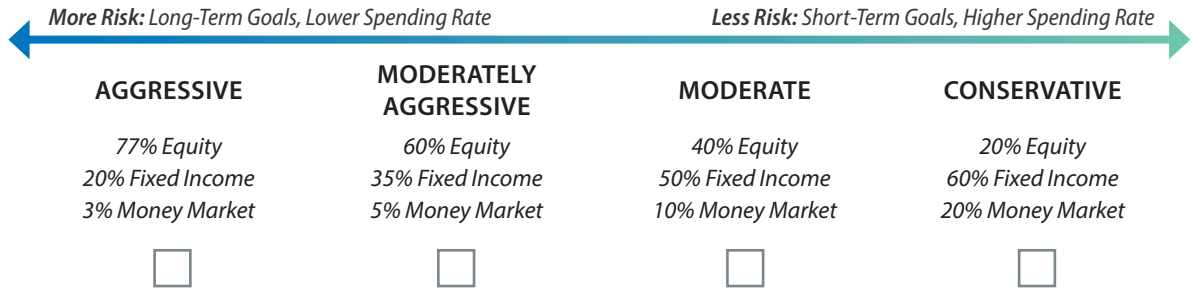
Investment Pools	<div style="display: flex; justify-content: space-between; align-items: center;"> <div style="text-align: center;"> <p>MORE RISK Long-Term Goals Lower Spending Rate</p> </div> <div style="text-align: center;"> <p>LESS RISK Short-Term Goals Higher Spending Rate</p> </div> </div>					
	Mix Options ▶	AGGRESSIVE	MODERATELY AGGRESSIVE	MODERATE	CONSERVATIVE	RISK AVERSE
Domestic Equity	55%	43%	29%	14%	0%	
International Equity	22%	17%	11%	6%	0%	
Intermediate-Term Fixed Income	10%	10%	15%	18%	0%	
Short-Term Fixed Income	10%	25%	35%	42%	0%	
Money Market	3%	5%	10%	20%	100%	

*Combined total must equal 100%

Option 2: The assets in the Fund will be invested in LBCF'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.

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: 75% Developed Markets / 25% 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 advisor's platform. Your financial advisor will have online access to view your Fund information in Long Beach Community Foundation's donor portal, including balance, contribution and grant history, and will make investment selections for your Fund on your behalf.

Long Beach Community Foundation will contact your financial advisor to set up the investment account. A Fund advisor or family member may not be named as the Fund's financial advisor.

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

With your permission, your financial advisor can communicate your grant requests to LBCF.

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

Terms & Required Signature(s)

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

For assets in LBCF'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 LBCF's investment program is vested in LBCF'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 longbeachcf.org/about/financials 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 financial advisor on a discretionary basis, until such time that LBCF or the Fund Advisor(s) exercise(s) the option to make a different selection for management of this Fund. The named financial advisor will manage the assets of this Fund in accordance with the Fund advisor(s)' charitable objectives. LBCF will regularly review the financial performance of this Fund.

As required by IRS regulations:

- a) the investment recommendation is advisory only and LBCF may, at its sole and absolute discretion, follow or decline to follow the recommendation;
- b) LBCF may at any time, at its sole and absolute discretion, change the investment of all or any portion of the assets in the Fund;
- c) if the investment recommendation is accepted, the investments will be administered in accordance with the financial policies and fiduciary standards of LBCF; 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.

Signature	Printed Name	Date
Signature	Printed Name	Date