



INVESTMENT RECOMMENDATION FORM

Fund Name: _____

Fund ID: _____

OPTION 1: COMMUNITY FOUNDATION INVESTMENT POOLS

If you want the Fund invested in the Community Foundation’s investment pools, please select one mix from the Investment Committee allocation options below, or select your own mix, and then review the acknowledgments and sign and date below. The Investment Committee allocation option percentages may change from time to time upon Investment Committee review.

Table with 4 columns: POOL, Cash Pool, Investment Pool, Select Your Mix. Rows include Cash Pool, Investment Pool, TOTAL, and CHECK A BOX.

OPTION 2: FINANCIAL ADVISOR PROGRAM

With this option you can benefit from customized investment management by an advisor you select.

I (we), the undersigned, would like to establish a segregated investment account that is managed directly by:

Financial Advisor’s Name: _____

Firm Name: _____

Address: _____

City State Zip Code: _____ Phone: _____

Email Address: _____ Online Viewing Access:

My (our) financial advisor will participate in the Community Foundation’s Financial Advisor Program until such time the Community Foundation or I (we) exercise the option to make a different selection for management of this Fund. As a participant in the Financial Advisor Program, I (we) understand that my (our) elected financial advisor will be responsible for the management of the assets of this Fund, and he/she will do so in accordance with the most current financial policies and standards of the Community Foundation.

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

- 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;
b) 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;
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.

Name (Print) Name (Signature) (Date)