

Investment Pool Recommendation Form

Your Giving Fund may be invested for stability of principal or for growth potential in NCF's investment pools. Funds with balances of \$300,000 or more may be separately managed by your professional advisor. Learn more about our investment options at ncfgiving.com/investments.

Please select one or more investment pools below and indicate the percentages you desire for each pool, totaling 100%.

(Note: The final five pools are diversified among global equities, fixed-income, commodities, and risk-reducing alternative investments.)

- _____ % Money Market: Stable value earning money-market-fund rates
- _____ % Fixed Income: Short-duration, investment-grade, fixed-income investments
- _____ % Moderate Income – 25% Equity: Cautious equity mix for 3+ year holding periods
- _____ % Balanced Income – 35% Equity: Cautious equity mix for 5+ year holding periods
- _____ % Balanced Growth – 50% Equity: Moderate equity mix for 5+ year holding periods
- _____ % Growth – 70% Equity: Highest-risk equity mix for long-term holding periods (7+ years)

100% TOTAL Note: Changes to your investment options may be made only once every 30 days.

SIGNATURES

Primary Fund Holder Signature (Required)

Date

Additional Fund Holder Signature (Required)

Date

Fund Name

Fund #

Address

Email

City State Zip