



Donor Investment Portfolio Selection

Foundation Investment Portfolios are designed in accordance with the Foundation's Investment Policy Statement (IPS). Copies of the current IPS are available upon request. Foundation Investment Portfolios are designed with the goal of growing investments, while minimizing risk through diversification. Quarterly and annual Investment Portfolio performance reports are available for inspection upon request.

As with all investments, each Foundation Investment Portfolio is subject to performance risk, including possible loss of value.

Investment Portfolio	Objective	Appropriate For	Target Investment Mix	Default Portfolio For
A. Growth	Total Return	Funds to be invested for a period longer than 5 years.	75% Equities, 25% Bonds and Alternatives	Endowment Funds
B. Balanced	Total Return	Funds to be invested for a period between 3-5 years.	50% Equities, 50% Bonds and Alternatives	
C. Short Term Fund	Preservation of Principal with a secondary focus on income	Funds to be invested for a period of less than 2 years.	Fixed Income and Cash and cash equivalents	
D. Cash	Preservation of principal	Funds to be invested for a period of less than 2 years	Cash and cash equivalents	

Please invest our funds in the following Investment Portfolio (initial no more than one selection):

A. Growth _____	B. Balanced _____	C. Short Term Fund _____	D. Cash _____
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Fund Name: _____

Donor 1 Signature: _____

Print Name and Date: _____

Donor 2 Signature: _____

Print Name and Date: _____