

RECOMMENDATION FOR INVESTMENT OF ASSETS

As each pool represents a diversified investment objective, we recommend that you select a single pool that matches your charitable goals. For new funds, if no pool is chosen, the Fund will be invested in the Short Term Pool.

Fund Name: _____

Select your Pool(s) (Allocation must be equal to 100%)	
<input type="checkbox"/> Short Term Pool	_____ %
<input type="checkbox"/> Mid Term Pool	_____ %
<input type="checkbox"/> Long Term ESG Pool	_____ %
<input type="checkbox"/> Long Term Index Pool	_____ %
<input type="checkbox"/> Impact Investment Pool	_____ %
<input type="checkbox"/> Endowment Pool	_____ %
Total = _____ %	
Notes: _____	

I/We have reviewed the Guide to JCF Investment Pools and recommend that the assets of the fund be invested as indicated above.

Advisor(s) or Authorized Representative(s):

Signature _____ Date _____

Signature _____ Date _____

Signature _____ Date _____

There are market risks with respect to any investment and the Foundation can offer no assurance against risk of loss. Pool investments and objectives are subject to change. Please refer to our website at www.jcfsandiego.org or contact Foundation staff at (858) 279-2740 for more detailed information regarding pool investments. Allocations are subject to change; please refer to the latest performance report.

