

INVESTMENT RECOMMENDATION FORM

Indian River Community Foundation's investment program offers the flexibility to customize your Fund's investments to meet your charitable goals, whether they are immediate or long term.

Please select **one** of the following options and complete the corresponding section regarding the Fund's investments.

Please return form to: donorservices@ircommunityfoundation.org or fax to 772.492.1408

Fund Name

Fund ID

OPTION 1

I/we request that the assets in the Fund be managed directly by my/our financial advisor.

OPTION 2

I/we request that the assets in the Fund be invested in the Community Foundation's investment pools.

OPTION 1

The assets in the Fund will be invested separately in a financial advisor managed account on your advisor's platform.

Your financial advisor will be contacted 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

Phone

Firm Name

Email

Address

City

State

Zip Code

Online Fund Access for Financial Advisors Complete if selecting Option 1.

With your permission, your financial advisor can have online access to view your Fund information, including balance, contribution and grant history, and will make investment selections for your Fund on your behalf.

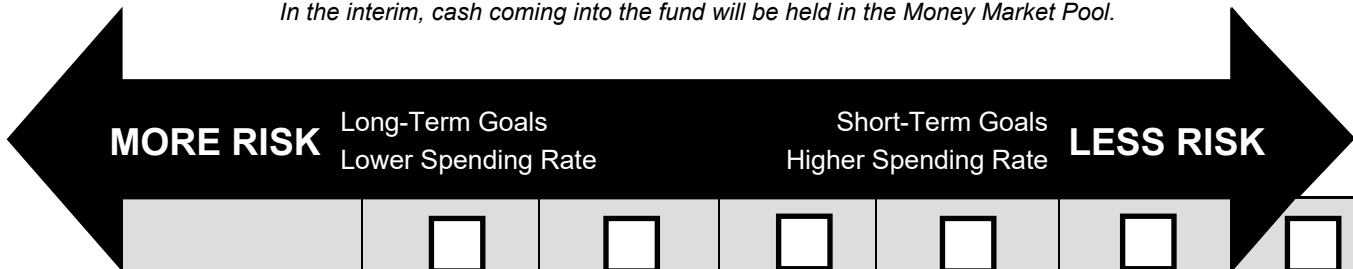
Check here to give your financial advisor access to view your Fund online.

Internal Use Only: Fund ID _____
Received by Investment Team _____

OPTION 2

The assets in the Fund will be invested in Indian River Community Foundation's Investment Pools.

Select a mix from the options below, or create your own mix. Allocations are rebalanced to targets once a month. In the interim, cash coming into the fund will be held in the Money Market Pool.



Investment Pools

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mix Options:	Aggressive	Moderately Aggressive	Moderate	Conservative	Risk Averse	Custom Mix*
Money Market	3%	5%	10%	20%	100%	
Short-Term Fixed Income	10%	25%	35%	42%	0%	
Intermediate-Term Fixed Income	10%	10%	15%	18%	0%	
Domestic Equity	55%	43%	29%	14%	0%	
International Equity	22%	17%	11%	6%	0%	

Terms & Required Signature(s)

*Combined total must equal 100%

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 Indian River Community Foundation's 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 and the most current financial policies and standards of Indian River Community Foundation and Greater Horizons, which can be found at www.greaterhorizons.org/fap-guidelines. Indian River Community Foundation will regularly review the financial performance of this Fund.

For assets in the Indian River Community Foundation's Investment Pools: The responsibility for managing Indian River Community Foundation's investment program is vested in Indian River Community Foundation's Board of Directors through its Investment Committee. The percentages in the mix options may change from time to time upon Investment Committee review.

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

- a) the investment recommendation is advisory only and the Community Foundation may, at its sole and absolute discretion, follow or decline to follow my/our recommendation;
- b) Indian River 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 the recommendation is accepted, the investments will be administered in accordance with the financial policies and fiduciary standards of Indian River 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.

Signature	Printed Name	Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
Signature	Printed Name	Date
<input type="text"/>	<input type="text"/>	<input type="text"/>



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