

# 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](http://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

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Your Signature

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Date

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Your Signature

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Date

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Fund Name

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Fund #

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Address

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Email