

INVESTMENT PORTFOLIO RECOMMENDATION FORM

By completing this section, Donor(s) recommends that the assets contributed by Donor(s) to a Giving Fund with National Christian Foundation (NCF) be invested into one of the portfolios listed below.

Donor(s) understands that it is the current policy of NCF to allocate earnings and losses to the Giving Fund on a monthly basis.

This is an advisement, not a directive, and may or may not be followed by the investment committee of NCF. For more information about the NCF Giving fund investment options, visit our website or contact us.

Note: Only if the Donor's Fund balance is \$100,000 or above may the Donor recommend two investment pools. If the Donor's recommendation is more than one investment, the recommended allocation(s) will be rebalanced yearly in August. Giving Fund balances of \$300,000 or more may be separately managed by the donor's recommended investment manager. Contact NCF for details.

Please recommend the *percentage(s)* of your investment option for your Fund:

_____ % Money Market Strategy

_____ % Bond Strategy*

_____ % Conservative Strategy*

_____ % Balanced Strategy*

_____ % Growth Strategy*

*As an investment in mutual funds, the value of those portfolios will fluctuate with market conditions. The assets within your fund may be worth more or less than your original contribution.

Donor Signature

Date

Donor Signature

Date

Fund Name

Fund / Account #

Address

Email