



THE NATIONAL CHRISTIAN FOUNDATIONSM

INVESTMENT PORTFOLIO RECOMMENDATION FORM

By completing this section, Donor(s) recommends that the assets contributed by Donor(s) to an NCF Giving Fund be invested into one of the NCF 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 the NCF Web site at www.nationalchristian.com or contact NCF.

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.

** Please note: Giving Funds with a balance of less than \$50,000 will be exempt from monthly administrative allocations. During the time period that the total balance is below \$50,000, investment gains or losses do not affect Fund value. This provides a stable Fund value, as well as the ability to add to the fund and distribute from the Fund via the Donor Web free of charge.

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

Fund Name: _____ Fund/Account #: _____

Address: _____ Email: _____