



*To carry on the work of Christ by fostering philanthropy*

400 E. Monroe Street • Phoenix, AZ 85004  
Phone 602.354.2400 • Fax 602.354.2423  
www.ccfphx.org • Email: info@ccfphx.org

## Endowment Fund Investment Recommendation Form

*Please use this form to direct the Foundation on investment preferences for your Endowment Fund*

### Fund Information

Fund Name: \_\_\_\_\_

### Investment Recommendations

You may select the balance of securities and fixed income for your fund's investment profile. Please choose from the following options, or you may defer this decision to the Catholic Community Foundation's Investment Committee.

#### Equities / Fixed

- 100% / 0%
- 90% / 10%
- 80% / 20%\*
- 70% / 30%
- 60% / 40%

\* Recommended by the Foundation's Investment Committee.

### Authorization

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Parish/School/Ministry: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Please return this form to the Catholic Community Foundation.**