



To carry on the work of Christ by fostering philanthropy

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Personal Family Fund Investment Recommendation Form

Please use this form to direct the Foundation on investment preferences for your Personal Family 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

Fund Advisor

Signature

Date

Please return this form to the Catholic Community Foundation.