



## DONOR ADVISED FUND INVESTMENT RECOMMENDATION FORM

Please use this form to direct the Foundation on the investment preferences of your Donor Advised Fund.

### Fund Information

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

### Investment Recommendation

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

- 80% / 20%\*
- 50% / 50%
- 0% / 100% Money Market

\*Recommended by the Foundation's Investment Committee

### Authorization

\_\_\_\_\_  
Fund Advisor

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Please return this form to the Catholic Community Foundation.

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