



Investment Change Form

Fund name: _____

Date: _____

As the duly appointed signatories of this fund, you hereby certify the following change in investment strategy for this fund. Only the advisors you have listed on your fund agreement need to sign. By signing below, you understand that ***this change will take place as soon as possible after this signed form is scanned to the Catholic Community Foundation at donorcare@ccfphx.org***.

We cannot accept investment changes over the phone or via email. A change form must be submitted for each investment change you request.

Each of our signatures below agree that below is/are the **portfolio revisions** we wish at this time for the fund listed above.

Signatory #1 Full name *printed*

Signatory #1 signature

Signatory #2 Full name *printed*

Signatory #2 signature

Signatory #3 Full name *printed*

Signatory #3 signature

Signatory #4 Full name *printed*

Signatory #4 signature

REVISED ASSET ALLOCATION REQUESTED

Growth Investment Portfolio
75% Equity, 25% Fixed Income

_____%

Capital Preservation Investment Portfolio*
35% Equity, 65% Fixed Income

_____%

Intermediate Investment Portfolio
50% Equity, 50% Fixed income

_____%

Fixed Income Investment Portfolio
100% Fixed income

_____%

*Consultation with the Catholic Community Foundation and BNY Mellon is required to invest in the Capital Preservation Investment Portfolio