



INVESTMENT ALLOCATION OPTIONS



INVESTMENT ALLOCATION

Please indicate your recommended investment allocation below.

Name of Fund

_____ Account # _____

Whitefish Community Foundation offers a variety of investment options, each of which is designed to meet a range of philanthropic goals and time horizons. Each of our investment pools are carefully designed to maximize return and minimize volatility. Investments are monitored regularly by the community foundation’s experienced investment committee, consultant, and staff.

As a fund advisor, you may allocate to one or more investment pools, and you may change the investment allocation once per year or upon a significant change in charitable goals and time horizon for depleting the fund. The community foundation will maintain your fund’s investment allocation through regular monthly rebalancing.

If no allocation choice is made, the Capital Preservation Pool will be selected by the Investment Committee.

<p>_____ % Long-Term Growth Pool time horizon 10 years or more</p>		<p>Long Term Capital Growth 77% equity, 22% fixed income, 1% cash</p>
<p>_____ % Balanced Pool time horizon 5 years or more</p>		<p>Balanced mixture of safety, income, and capital appreciation 51.5% equity, 46.5% fixed income, 2% cash</p>
<p>_____ % Capital Preservation Pool time horizon 1 to 3 years</p>		<p>Stability of Principal Combination of money market, certificates of deposit, and other liquid short term securities</p>

Future contributions will be invested according to the allocation specified above. Investment allocations can be changed through written instruction once per year or upon a significant change in charitable goals and time horizon for depleting the fund.

Please contact the community foundation at linda@whitefishcommunityfoundation.org or call 406-863-1781 if you have questions or need additional information.

Fund Advisor Signature: _____ Date: _____