

# Investment Recommendation Form for Charitable Funds



The Community Foundation and its affiliates offer an array of investment options designed to meet individualized fund objectives, time horizon and risk tolerance. Pooled investment options are available to all charitable funds. Once your fund is initially invested, the Community Foundation will require notice to make investment changes. Please submit this form to the Community Foundation by January 15, April 15, July 15 or October 15 for investment changes to be effective the following quarter. Investment changes may be requested once in a 12-month period.

## Pooled Investment Options

Only one option can be selected at a time. Donors can change options once every four quarters.

<input type="checkbox"/>	Spider Management Company (actively managed, long term, endowment approach)
<input type="checkbox"/>	Vanguard Indexed Funds: 80/20 Asset Allocation
<input type="checkbox"/>	Vanguard Indexed Funds: 60/40 Asset Allocation
<input type="checkbox"/>	Vanguard Indexed Funds: 40/60 Asset Allocation
<input type="checkbox"/>	Vanguard Indexed Funds: Socially Responsible 80/20 Asset Allocation
<input type="checkbox"/>	Money Market Fund

## Individually Managed Funds

<input type="checkbox"/>	<p>Individually Managed Funds Fund donors who maintain an asset balance of greater than \$1,000,000 may recommend an outside investment manager to manage the fund's portfolio. Investment managers must be approved by the Foundation's Investment Committee and meet its due diligence standards.</p> <p>Firm Name: _____ Phone: _____ _____</p> <p>Contact Name: _____</p>
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By signing below, all Advisors to the fund agree that the fund is subject to the policies of the Community Foundation for a greater Richmond and its affiliates and, if applicable, understand the liquidity timeline described above. The signature below represents the mutual consent of all fund advisors. The investment recommendation selected above reflects my/our careful consideration of the anticipated annual spending and grantmaking plans for the fund.

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

Signature of Spokesperson/Advisor: \_\_\_\_\_

Print name: \_\_\_\_\_ Date: \_\_\_\_\_

Please e-mail the completed form to: [adickinson@cfrichmond.org](mailto:adickinson@cfrichmond.org).

*The Community Foundation for a greater Richmond does not provide tax, legal, or investment advice. The information in our publications and on our website is general in nature and is not intended to be a substitute for consulting your legal, tax, or investment advisor regarding your particular situation. Any performance data is based on past performance and is no guarantee of future results.*

For more information, contact Michelle Nelson: at 804-409-5598, [mnelson@cfrichmond.org](mailto:mnelson@cfrichmond.org)