

# INVESTMENT RECOMMENDATION FORM GIFT FUNDS



Foundation For The Carolinas offers fundholders diverse investment options to grow fund assets for maximum philanthropic impact. Please select one of the following investment pools based on the anticipated needs for your gift fund (*please note: requested changes to your fund's investment pool will generally take effect on the first day of the following month after your completed form is received*). For additional information on FFTC's investment pools, visit [www.ffc.org/pools](http://www.ffc.org/pools).

## Investment Pools

## Fund Type

Pool choices for gift funds between \$10,000 - \$50,000

Non-Endowed    Endowed

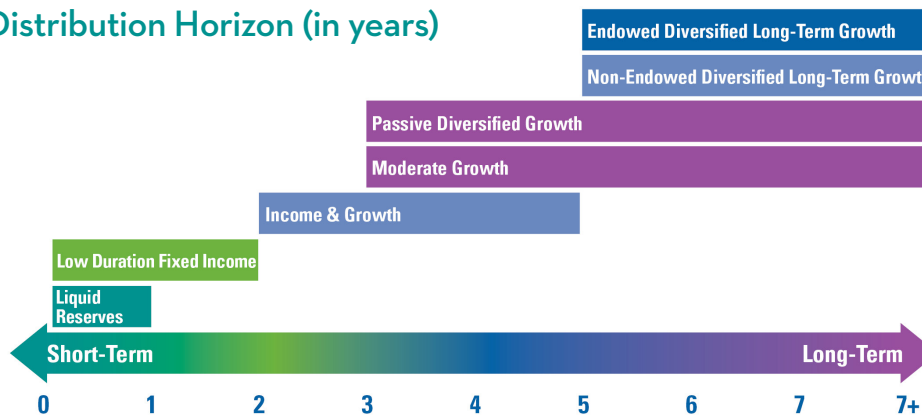
<input type="checkbox"/>	Liquid Reserves Pool	✓	
<input type="checkbox"/>	Low Duration Fixed Income Pool	✓	

Pool choices for gift funds greater than \$50,000

<input type="checkbox"/>	Liquid Reserves Pool	✓	
<input type="checkbox"/>	Low Duration Fixed Income Pool	✓	
<input type="checkbox"/>	Income & Growth Pool	✓	
<input type="checkbox"/>	Moderate Growth Pool	✓	✓
<input type="checkbox"/>	Passive Diversified Growth Pool	✓	✓
<input type="checkbox"/>	Non-Endowed Diversified Long-Term Growth Pool	✓	✓
<input type="checkbox"/>	Endowed Diversified Long-Term Growth Pool		✓

<input type="checkbox"/>	<p><b>Investment Alliance Program</b></p> <p>For funds that maintain an asset balance greater than \$250,000, you may recommend a specific investment manager from outside FFTC's core investment pool to manage the fund portfolio (<i>FFTC's Investment Committee must approve the recommended manager</i>):</p> <p>_____</p>	✓	✓
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## Anticipated Distribution Horizon (in years)



By signing below, I (we) understand that all gift funds are subject to the policies of Foundation For The Carolinas as set forth in the Charitable Giving Guide. The investment recommendation selected above includes careful consideration of the anticipated annual spending and grantmaking plans for the gift fund.

Gift Fund Name & Number: \_\_\_\_\_

Signature of Advisor: \_\_\_\_\_

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

Please email the completed form to [investments@ffc.org](mailto:investments@ffc.org).

Foundation For The Carolinas 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.