

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.fftc.org/pools.

Investment Pools

Fund Type

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

Non-Endowed Endowed

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

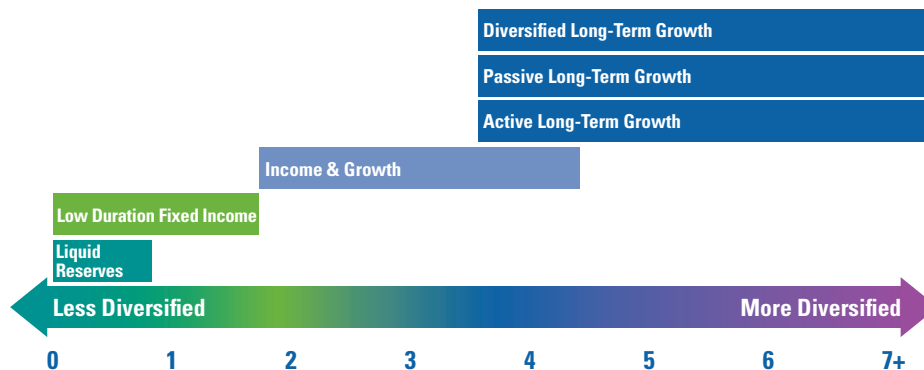
Pool choices for gift funds greater than \$50,000

<input type="checkbox"/>	Liquid Reserves	✓	
<input type="checkbox"/>	Low Duration Fixed Income	✓	
<input type="checkbox"/>	Income & Growth	✓	
<input type="checkbox"/>	Passive Long-Term Growth (formerly Passive Diversified)	✓	✓
<input type="checkbox"/>	Active Long-Term Growth (formerly Moderage Growth)	✓	✓
<input type="checkbox"/>	Diversified Long-Term Growth (formerly Endowed & Non-Endowed)	✓*	✓

*Restrictions on withdrawals apply depending upon the fund balance. Less than \$1M – Available within 90 days; \$1M - \$5M – 80% available within 90 days, remainder within 1YR; Greater than \$5M, please contact relationship manager.

<input type="checkbox"/>	Investment Alliance Program 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 (FFTC's Investment Committee must approve the recommended manager): _____	✓	✓
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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 and if applicable, understand the liquidity terms described above. 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@fftc.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.