

INVESTMENT ALLOCATION

SILICON VALLEY | **community foundation**
SERVING SAN MATEO AND SANTA CLARA COUNTIES

Please refer to the Investment Options information sheet for a detailed description of each investment pool and indicate your recommended investment allocation below.

Name of Fund

New Fund Existing Fund

You may allocate your contribution to one or more of the following four investment pools. The total must equal 100%.

_____ % Long-Term Growth	7 or more years time horizon or endowment 75%/25% equity/fixed income Up to 25% of equity in alternative investments
_____ % Balanced	3 to 7 year time horizon 50%/50% equity/fixed income Up to 10% of equity in alternative investments
_____ % Short-Term	1 to 3 year time horizon 100% fixed income investments in short and intermediate term bonds, global bonds and money market securities.
_____ % Grant Reserves	Stable value reserve for grants to be distributed within 12 months or less No return, no fees

Alternatively, you may allocate to one or both of the investment pools listed below. These pools may not be combined with the pools above. The total must equal 100%.

_____ % Social Impact	7 or more years time horizon, or endowment 70%/30% equity/fixed income securities Investments screened for social impact
_____ % Capital Preservation	Preservation of principal Highly liquid, money market securities



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Future contributions will be invested according to the allocation specified above. Investment allocations can be changed through written instruction once per year or when a significant change to grantmaking or fund balance occurs. Reallocations occur on the first business day of the month.

Please contact the community foundation at donate@siliconvalleycf.org or 650.450.5444 if you have questions or need additional information.

Fund Advisor Signature

Date