

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 five investment pools. The total must equal 100%.

_____ % Long-Term Growth **For funds with time horizons of seven or more years**

_____ % Social Impact **For funds with time horizons of seven or more years**

_____ % Balanced **For funds with time horizons of three to seven years**

_____ % Short-Term **For funds with time horizons of one to three years**

_____ % Capital Preservation **For funds with time horizons of one year or less**

100% **Total**

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. 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 _____