



Investment Portfolio Recommendation Form

By completing this section, Donor(s) recommends that the assets contributed by Donor(s) to a Fund at SGF be invested into one of the portfolios listed below.

Donor(s) understands that it is the current policy of SGF to allocate earnings and losses to the Fund on a monthly basis.

This is an advisement, not a directive, and may or may not be followed by the investment committee of NCF/SGF. For more information about SGF's Fund investment options, visit SGF's website at www.saddlebackgivingfunds.com or contact us.

Note: If the Donor's Fund balance is \$100,000 or above, the Donor may recommend two investment pools. If the Donor's recommendation is followed, the recommended allocation(s) will be rebalanced on a quarterly basis, 15 days after quarter end, or when new contributions are made to such Fund. Fund balances of \$300,000 or more may be separately managed by the Donor's recommended investment manager. Contact SGF for details.

Please recommend the investment option for your Fund:

_____ Money Market Strategy

_____ Bond Strategy*

_____ Conservative Strategy*

_____ Balanced Strategy*

_____ Growth Strategy*

**As an investment in mutual funds, the value of those portfolios will fluctuate with market conditions. The assets within your Fund at SGF may be worth more or less than your original contribution.*

Donor Signature: _____ Date: _____

Donor Signature: _____ Date: _____

Fund Name: _____ Fund/Account #: _____

Address: _____

Email: _____