



# Contribution/Fund Investment Recommendation

Updated September 2018

This form is to establish or revise your fund's investment allocation. You may recommend a change to your investment allocation up to (4) times per calendar year. Please note that the default option for contributions is the **BlackRock Treasury Trust Fund (Money Market)**, unless you have designated an asset allocation. Underlying asset allocation for Pre-Set Portfolios, investment information and performance charts may be obtained at [jcfny.org/investments](http://jcfny.org/investments). For additional information, contact **Igor Musayev** at 646-843-6889 or email [igor@jcfny.org](mailto:igor@jcfny.org).

**Default Investment – Pooled** (\$5,000 of your balance must be in the BlackRock Treasury Trust Fund and/or BlackRock JCF Short Duration Bond Fund.)

	Dollars/Percentages		Dollars/Percentages
BlackRock Treasury Trust Fund (MMA)	_____	BlackRock JCF Short Duration Bond Fund	_____

**Pre-Set Portfolios – Pooled** (\$10,000 min per account)

JCF Conservative Portfolio	_____
JCF Moderate Portfolio	_____
JCF Aggressive Portfolio	_____
JCF ESG Portfolio	_____

**Fixed Income – Pooled** (\$2,500 min per account)

*Domestic*

BlackRock Core Bond Portfolio	_____
Loomis Sayles Investment Grade Bond	_____
Barings US High Yield	_____
(ESG) TIAA-CREF Social Choice Bond Fund	_____
T. Rowe Price Institutional Floating Rate	_____

*International*

Vanguard Total Intl Bond Index	_____
(\$5,000 min) Israel Bonds: Maccabee (2 year lock up)	_____
(\$25,000 min) Jubilee (2 year lock up)	_____

**Privately Managed – Pooled** (\$50,000 min per account)

Eagle Capital Management, LLC	_____
Gabelli Asset Management Co.	_____
Neuberger Berman, LLC	_____

**Equities – Pooled** (\$2,500 min per account)

*Large Cap*

Vanguard Institutional Index (S&P500)	_____
Harbor Large Cap Value	_____
(ESG) Neuberger Berman Sustainable Equity	_____
PRIMECAP Odyssey Growth Fund	_____

*Mid Cap*

Vanguard Mid-Cap Index	_____
Neuberger Berman Mid-Cap Intrinsic Value	_____

*Small Cap*

Vanguard Small Cap Index	_____
Neuberger Berman Genesis	_____

*International*

Vanguard Total Intl Stock Index	_____
Dodge & Cox International Stock	_____
(ESG) Domini Impact Intl Equity Fund	_____
(\$5,000 min) Market Vectors Israel ETF (\$25 transaction fee)	_____
RBC Emerging Markets Equity	_____

**Real Assets – Pooled** (\$2,500 min per account)

Principal Diversified Real Asset Fund	_____
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**PRIVATE CLIENT INVESTMENTS:**

JCF offers additional investment options for donors with minimum fund balances of \$500,000. For information, please contact Susan Dickman at 212-752-8277.

Investment Name: \_\_\_\_\_ Amount: \_\_\_\_\_

- CHOOSE ONE  I would like all future contributions and the fund balance to be invested in accordance with the asset allocation listed above.  
 For this particular contribution, I recommend the following investment allocation, which differs from my current allocation. I understand that this may change the fund's pre-existing investment allocation.

JCF should automatically rebalance my portfolio on a monthly basis to maintain this allocation  YES  NO

**DONOR ADVISED FUND INFORMATION & SIGNATURE**

Name \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Fund name \_\_\_\_\_ Fund # \_\_\_\_\_ Daytime phone \_\_\_\_\_

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