

Contribution/Fund Investment Recommendation Form

Updated March 2025



This form may be used to establish or revise your fund's investment allocation. 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. All investment allocations are subject to JCF's [Policies and Procedures Guide](#).

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 minimum per account)

	DOLLARS/PERCENTAGES		DOLLARS/PERCENTAGES
JCF Conservative Portfolio	_____	JCF Aggressive Portfolio	_____
JCF Moderate Portfolio	_____	ESG JCF ESG Portfolio	_____

FIXED INCOME - POOLED

(\$2,500 minimum per account)

DOMESTIC	DOLLARS/PERCENTAGES	DOMESTIC	DOLLARS/PERCENTAGES
Vanguard Total Bond Market ETF	_____	MassMutual High Yield	_____
BlackRock Core Bond Portfolio	_____	ESG TIAA-CREF Core Impact Bond Fund	_____
BlackRock Strategic Income Opportunities	_____	T. Rowe Price Institutional Floating Rate	_____
Doubleline Total Return	_____		
Loomis Sayles Investment Grade F/I	_____		
		INTERNATIONAL	DOLLARS/PERCENTAGES
		Vanguard Total Intl Bond Index ETF	_____

PRIVATELY MANAGED - POOLED

(\$50,000 minimum per account)

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

REAL ASSETS - POOLED


(\$2,500 minimum per account)

	DOLLARS/PERCENTAGES
Principal Diversified Real Asset Fund	_____

ESG = Environmental, Social, and Corporate Governance (ESG) refers to three central factors in measuring the sustainability and societal impact of an investment in a company or business.

EQUITIES - POOLED

(\$2,500 minimum per account)

LARGE CAP	DOLLARS/PERCENTAGES	MID CAP	DOLLARS/PERCENTAGES
Vanguard S&P 500 ETF	_____	Vanguard Mid-Cap Index ETF	_____
Vanguard Russell 1000 Growth Index Fund ETF	_____	Champlain Mid-Cap Fund	_____
Harbor Large Cap Value	_____		
Invesco QQQ Trust ETF	_____		
Jennison Growth Fund	_____		
 ESG Parnassus Core Equity Fund	_____		
SMALL CAP	DOLLARS/PERCENTAGES	INTERNATIONAL	DOLLARS/PERCENTAGE
Vanguard Small Cap Index ETF	_____	Vanguard Total Intl Stock Index ETF	_____
Neuberger Berman Genesis	_____	Dodge & Cox International Stock	_____
		RBC Emerging Markets Equity	_____

JEWISH IMPACT INVESTMENT OPTIONS

DOMESTIC EQUITY	DOLLARS/PERCENTAGES	ISRAEL FIXED INCOME	DOLLARS/PERCENTAGE
JLens Jewish Advocacy (\$5,000 minimum)	_____	Israel Bonds: Maccabee (2 year lock up) (\$5,000 minimum)	_____
ISRAEL EQUITY	DOLLARS/PERCENTAGE	Israel Bonds: Jubilee (2 year lock up) (\$25,000 minimum)	_____
VanEck Vectors Israel ETF (\$2,500 minimum)	_____	Israel Bonds: Shalom Bond (1 year lock up) (\$5,000 minimum)	_____
JCF SOCIAL IMPACT LOAN PROGRAM	DOLLARS/PERCENTAGE	Israel Bonds: Shalom Bond (2 year lock up) (\$5,000 minimum)	_____
Domestic		Israel Bonds: eShalom Bond (1 year lock up) (\$5,000 minimum)	_____
Hebrew Free Loan Society (2 year lock up) (\$25,000 minimum)	_____		
Hebrew Free Loan Society (5 year lock up) (\$25,000 minimum)	_____		
Israel			
Ogen (5 year lock up) (\$250,000 minimum)	_____		

HFLS and Ogen loans must not exceed 50% of the JCF fund balance.

