

Fund Asset Allocation Form

The investment committee of the Houston Jewish Community Foundation has partnered with Fiducient Advisors to manage multiple investment options for fund holders to select from. A short description of each investment pool is included on the second page to assist you with your selection. If you have any questions, please contact us for more information.

I/We _____ wish to recommend the
_____ Fund be invested as follows:

PLEASE SELECT FROM THE FOLLOWING TWO OPTIONS:

Option 1: Use this to select 100% of the fund balance to go into ONE investment pool

- Index Growth Pool
- Growth Pool
- Aggressive Growth Pool
- Conservative Pool
- Cash Management Pool
- NO Selection for Option 1

Option 2: Use to select a percent less than 100% for the Cash Management Pool and the remainder to go into one of the first four investment pools

- Index Growth Pool
- Growth Pool
- Aggressive Growth Pool
- Conservative Pool
- Cash Management Pool %
- NO Selection for Option 2

If no investment choice is selected, all funds will be invested in the Index Growth Pool.

Fundholder 1

Date

Fundholder 2

Date