Investment Options for Your Fund

This form allows you to recommend how the assets in your charitable fund will be invested. As a charitable fund, your fund can grow tax-free. The Houston Jewish Community Foundation Investment Committee has engaged Fiducient Advisors, an independent investment consulting firm, to oversee HJCF's investment options. Fundholders may choose from a variety of professionally managed investment pools.

Existing fundholders will remain invested according to their current investment allocation unless a change is requested. New fundholders will be invested in the Cash Management Pool until a completed Investment Allocation Form is received and processed.

Please email filled and saved form to info@hjcf.org

To learn more about each investment option and its historical performance, please call 346-699-4523 or visit our website www.hjcf.org under the Resources tab.

Today's Date: ____ / ____ / _____

Name: _____ Email: _____

Please indicate how you would like the assets in your fund allocated among the investment pools below. The total allocation must equal 100%.

I wish to recommend the Fund be invested as follows:

Cash Management Pool
_____%

Conservative Pool
_____%

Index Pool
_____%

Growth Pool
_____%

Aggressive Growth Pool
_____%

Total Allocation: 100%

HJCF Houston Jewish Community Foundation