



COMMUNITY FOUNDATION  
FOR NANTUCKET

# INVESTMENT RECOMMENDATION FORM

The Community Foundation for Nantucket’s investment program offers the flexibility to customize your Fund’s investments to meet your charitable goals, whether they are immediate or long term.

Please select either Option 1, below, or Option 2 on the following page for your Fund’s investments.

Please complete this form and return to [info@cfnan.org](mailto:info@cfnan.org).

Name of Fund	Fund ID
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**Option 1:** The assets in the Fund will be invested separately in a financial advisor managed account on your advisor’s platform.

*Your financial advisor will be contacted to set up the investment account. A Fund advisor or family member may not be named as the Fund’s financial advisor.*

Financial Advisor Name	Firm Name
Address	City State Zip Code
Phone	Email Address

**Online Fund Access for Financial Advisors** *Complete if selecting Option 1.*

With your permission, your financial advisor can have online access to view your Fund information, including balance, contribution and grant history, and will make investment selections for your Fund on your behalf.

Check here to give your financial advisor access to view your Fund online.

**Option 2:** The assets in the Fund will be invested in the Community Foundation for Nantucket's Investment Pools.

Select a mix from the options listed below, or create your own mix. Allocations are rebalanced to targets once a month. In the interim, cash coming into the Fund will be held in the Money Market Pool.

		<b>MORE RISK</b> Long-Term Goals Lower Spending Rate			<b>LESS RISK</b> Short-Term Goals Higher Spending Rate	
		←	←	←	←	→
<b>Mix Options ▶</b>		AGGRESSIVE	MODERATELY AGGRESSIVE	MODERATE	CONSERVATIVE	RISK AVERSE
<b>Investment Pools</b>	Money Market	3%	5%	10%	20%	100%
	Short-Term Fixed Income	10%	25%	35%	42%	0%
	Intermediate-Term Fixed Income	10%	10%	15%	18%	0%
	Domestic Equity	55%	43%	29%	14%	0%
	International Equity	22%	17%	11%	6%	0%

\*Combined total must equal 100%

**Terms & Required Signature(s)**

*For assets in a financial advisor managed account:* The assets in the Fund will be managed directly by the named financial advisor on a discretionary basis, until such time that the Community Foundation for Nantucket or the Fund Advisor(s) exercise(s) the option to make a different selection for management of this Fund. The named financial advisor will manage the assets of this Fund in accordance with the Fund advisor(s)' charitable objectives and the most current financial policies and standards of the Community Foundation for Nantucket and Greater Horizons, which can be found at [www.greaterhorizons.org/fap-guidelines](http://www.greaterhorizons.org/fap-guidelines). The Community Foundation for Nantucket will regularly review the financial performance of this Fund.

*For assets in the Community Foundation for Nantucket's Investment Pools:* The responsibility for managing the Community Foundation for Nantucket investment program is vested in the Community Foundation for Nantucket Board of Trustees through its Investment Committee. The percentages in the mix options may change from time to time upon Investment Committee review.

As required by IRS regulations:

- a) the investment recommendation is advisory only and the Community Foundation for Nantucket may, at its sole and absolute discretion, follow or decline to follow the recommendation;
- b) the Community Foundation for Nantucket may at any time, at its sole and absolute discretion, change the investment of all or any portion of the assets in the Fund;
- c) if the investment recommendation is accepted, the investments will be administered in accordance with the financial policies and fiduciary standards of the Community Foundation for Nantucket; and
- d) investments are subject to normal market and interest rate fluctuation risks, and any gain or loss generated by the above investments will be credited or charged to the Fund.

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

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Signature Printed Name Date