



INVESTMENT STRATEGY RECOMMENDATION FORM

Name of Fund _____ Date _____

Your name (print) _____ Signature _____

I/we recommend the above-named fund be invested as follows (check one):

_____ Money Market Strategy

_____ Total Fixed Strategy

_____ Total Equity Strategy

_____ Traditional Strategy (70% equity/30% fixed)

_____ Comprehensive Strategy
(57.5% equity/25% fixed/17.5% special strategies)

Please see accompanying illustrations for a full description of each of the investment strategies.

Since each investment strategy represents a diversified investment program, we recommend that you select a strategy that matches your charitable plans and risk tolerance. If no strategy is chosen, your fund will be invested in the Money Market Strategy.*

You may recommend changes to your strategy by notifying the Foundation in writing.

There are market risks associated with any investment and therefore no assurance against risk of loss.

Please return this form via fax to: 901-374-0451

Or Mail: Jewish Foundation of Memphis
6560 Poplar Avenue
Memphis, TN 38138

*If you already have a fund at the foundation, and you do not choose a strategy, your fund will be invested in the strategy that most closely mirrors the investment recommendation on file for your fund.