



## 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)
- \_\_\_\_\_ Balanced Strategy (50% equity/50% fixed)
- \_\_\_\_\_ Conservative Strategy (30% equity/70% fixed)
- \_\_\_\_\_ Index Fund Strategy (50% equity/50% fixed)

*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  
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