

# INVESTMENT RECOMMENDATION FORM GIFT FUNDS



Foundation For The Carolinas offers fundholders diverse investment options for philanthropic impact. These investment options span the risk-return spectrum from conservative allocations to more growth-oriented investment pools. Please select one of the following investment pools that best fits your investment objective, anticipated grantmaking, timeline and ongoing contribution rate. *Please note: The initial selection of, or requested changes to, your fund's investment pool will generally take effect within 10 business days after your completed form is received.*

For information on FFTC's investment pools including investment fees, visit: [www.ffc.org/pools](http://www.ffc.org/pools). For administrative fee schedules, visit: [www.ffc.org/advisor\\_resources#administrative-fee-schedules](http://www.ffc.org/advisor_resources#administrative-fee-schedules). For pool selection questions, please contact the FFTC investments team at 704.973.4539.

## Investment Pools

|                          |                               |
|--------------------------|-------------------------------|
| <input type="checkbox"/> | Liquid Reserves               |
| <input type="checkbox"/> | Low Duration Fixed Income     |
| <input type="checkbox"/> | Income & Growth               |
| <input type="checkbox"/> | Passive Long-Term Growth      |
| <input type="checkbox"/> | ESG Long-Term Growth          |
| <input type="checkbox"/> | Active Long-Term Growth       |
| <input type="checkbox"/> | Diversified Long-Term Growth* |

\*Restrictions on withdrawals apply depending upon the fund balance. Less than \$1M – funds will generally be available for other investment options or grantmaking 90 days after request; \$1M-\$5M – First 80% generally available 90 days after request. Balance is generally available for other investment options or grantmaking one year after request; Greater than \$5M, contact relationship manager for terms.

## Investment Alliance Program

For funds greater than \$250,000, you may recommend a specific investment manager from outside FFTC's standard investment pools to manage the fund portfolio (*FFTC's Investment Committee must approve the recommended manager*):

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## Anticipated Distribution Horizon (in years)



By signing below, I (we) acknowledge that I have received and understand FFTC's pool investment fees & administrative fees and that all funds are subject to the policies of Foundation For The Carolinas as set forth in the Charitable Giving Guide.

Gift Fund Name & Number: \_\_\_\_\_

Signature of Advisor: \_\_\_\_\_

Print name: \_\_\_\_\_ Date: \_\_\_\_\_

Please email the completed form to [investments@ffc.org](mailto:investments@ffc.org).

Foundation For The Carolinas does not provide tax, legal or investment advice. The information in our publications and on our website is general in nature, and is not intended to be a substitute for consulting your legal, tax or investment advisor regarding your particular situation. Any performance data is based on past performance and is no guarantee of future results.