



# Contribution/Fund Investment Recommendation

This form is to establish or revise your fund's investment allocation. You may recommend a change to your investment allocation up to (4) times per calendar year. Please note that the default option for contributions is the **BlackRock Treasury Trust Fund (Money Market)**, unless you have designated an asset allocation. Investment information and performance chart may be obtained at [jcfny.org/investments](http://jcfny.org/investments). For additional information, contact **Igor Musayev** at 646-843-6889 or email [igor@jcfny.org](mailto:igor@jcfny.org).

Please choose from one of our **Pre-Set Investment Portfolios (Option A)** or create a **Customized Investment Allocation (Option B)**.

**OPTION A: PRE-SET INVESTMENT PORTFOLIOS** (Please see Pre-Set Investment Portfolios Performance Sheet for more information)

Please choose only **one** option from the pre-set Investment Portfolios listed below:

- |  |  |
|--|--|
| <input type="checkbox"/> Money Market Portfolio                | <input type="checkbox"/> Moderate Portfolio (\$50,000 min)   |
| <input type="checkbox"/> Conservative Portfolio (\$25,000 min) | <input type="checkbox"/> Aggressive Portfolio (\$50,000 min) |

**OR, OPTION B: CUSTOMIZED INVESTMENT ALLOCATION**

\*\$5,000 of your balance must be in the BlackRock Treasury Trust Fund and/or JCF Short Duration Bond Fund.

<u>Default Investment*</u>	Dollars or Percentages	<u>Equities</u> (\$2,500 min per account)	Dollars or Percentages
BlackRock Treasury Trust Fund	_____	<i>Large Cap</i>	
BlackRock JCF Short Duration Bond	_____	Vanguard Institutional Index (S&P500)	_____
		Harbor Large Cap Value	_____
<u>Fixed Income</u> (\$2,500 min per account)		Neuberger Berman Socially Responsive	_____
<i>Domestic</i>		PRIMECAP Odyssey Growth Fund	_____
BlackRock Core Bond Portfolio	_____	<i>Mid Cap</i>	
Loomis Sayles Investment Grade Bond	_____	Vanguard Mid-Cap Index	_____
Barings US High Yield	_____	Neuberger Berman Mid-Cap Intrinsic Value	_____
T. Rowe Price Institutional Floating Rate	_____	<i>Small Cap</i>	
<i>International</i>		Vanguard Small Cap Index	_____
Vanguard Total Intl Bond Index	_____	Neuberger Berman Genesis	_____
(\$5,000 min) Israel Bonds: Maccabee (2 year lock up)	_____	<i>International</i>	
<u>Privately Managed</u> (\$50,000 min per account)		Vanguard Total Intl Stock Index	_____
Eagle Capital Management, LLC	_____	Dodge & Cox International Stock	_____
Gabelli Asset Management Co.	_____	(\$5,000 min) Market Vectors Israel ETF (\$25 transaction fee)	_____
Neuberger Berman, LLC	_____		

- CHOOSE ONE  I would like all future contributions and the fund balance to be invested in accordance with the asset allocation listed above.  
 For this particular contribution, I recommend the following investment allocation, which differs from my current allocation. I understand that this may change the fund's pre-existing investment allocation.

JCF should automatically rebalance my portfolio on a monthly basis to maintain this allocation  YES  NO

**PRIVATE CLIENT INVESTMENTS:**

JCF offers additional investment options for donors with minimum fund balances of \$500,000. For information, please contact Susan Dickman at 212-752-8277.

**SIGNATURE**

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

\_\_\_\_\_  
Fund name Fund # Daytime phone