

Please complete this form to change the investment portfolio for your Creative Gift Fund. If you need assistance, please contact us at 800-858-6127.

## 1. Fund Information

Name of Primary Advisor

Name Telephone

Fund Name Account Number

## 2. Investment Recommendation Change

Recommendations and actual reallocation are subject to Foundation approval. Primary Advisors are welcome to make asset allocation recommendations by using more than one portfolio to reflect the expected timing and amount of their grant recommendation. The Primary Advisor may recommend asset allocation changes monthly.

### Change the asset allocation of my fund.

### Current percentage

### New Percentage

- |   |         |         |
|---|---------|---------|
| <input type="checkbox"/> <b>Money Portfolio</b>   | _____ % | _____ % |
| Seeks to preserve the nominal or par value of assets and to provide income commensurate with money market rates.  |         |         |
| <input type="checkbox"/> <b>Income Portfolio</b>  | _____ % | _____ % |
| Seeks current income that is commensurate with a quality bond portfolio while pursuing investments that are consistent with social-witness principles approved by the General Assembly of the Presbyterian Church (U.S.A.).   |         |         |
| <input type="checkbox"/> <b>Equity Portfolio</b>  | _____ % | _____ % |
| Seeks returns that are commensurate with a diversified portfolio of stocks issued by domestic and international companies while pursuing investments that are consistent with social-witness principles approved by the General Assembly of the Presbyterian Church (U.S.A.). |         |         |

## 3. Signature - required for authorization

Please print First Name Initial Last Name

Signature Date

## 4. Mailing Instructions

Please mail to: Presbyterian Foundation . 200 East Twelfth Street . Jeffersonville, IN 47130  
You may also fax this form to: 502-805-0466 or scan and email to [receipts@fdn.pcusa.org](mailto:receipts@fdn.pcusa.org).