



## INVESTMENT RECOMMENDATION CHANGE FORM

**Fund Name:** \_\_\_\_\_

The East Bay Community Foundation is pleased to offer donors the opportunity to recommend an investment strategy that best fits their philanthropic plans. Investment activity is reviewed by the Foundation on a quarterly basis.

Please provide us with your current email address. Changes will be processed and confirmed via email.

Email Address: \_\_\_\_\_

Please indicate your preferred investment allocation below\*:

Pool	Allocated percentage of Fund assets	Estimated range of annual investment expenses expressed as a percentage of asset value
Cash Pool	_____%	0.15% to 0.25%
Short-Term Pool	_____%	0.40% to 0.60%
Intermediate-Term Pool	_____%	0.60% to 0.90%
Environmental, Social, Governance Pool (LT)	_____%	0.65% to 0.95%
Long-Term Pool	_____%	0.70% to 1.10%
<b>Total:</b>	<b>100%</b>	

*\*Please note that changes to investment allocations are permitted once per quarter.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Email completed form to:  
 Jeri Boomgaarden  
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 510.208.0857