



Donor Recommendation of Investment Allocation For Charitable Trusts

Thank you for allowing Barnabas Foundation to trustee your Charitable Trust. **Please read the "Disclosure Document on the Barnabas Foundation Common Trust Fund"**. Then check one of the options in the Investment Preference section below. If you prefer to recommend an investment allocation different than one of the five suggested below, enter the desired percentages in the Customized column. Please sign and return the form to us.

Name of the Charitable Trust _____

INVESTMENT PREFERENCE

____ I (We) have read the enclosed disclosure statement, understand the risk of investing and recommend the investment allocation of my (our) Charitable Trust as indicated below.

Please check one of the following:

Name of Fund	<input type="checkbox"/> <u>Aggressive Growth</u>	<input type="checkbox"/> <u>Long-term Growth</u>	<input type="checkbox"/> <u>Balanced</u>	<input type="checkbox"/> <u>Conservative</u>	<input type="checkbox"/> <u>Income</u>	<input type="checkbox"/> <u>Customized</u>
US Large Cap Equity	10%	10%	8%	8%	0%	%
US Small Cap Equity	5%	5%	2%	2%	0%	%
International Equity	9%	9%	6%	5%	0%	%
Emerging Int'l Equity	6%	6%	4%	3%	0%	%
Global Equity	35%	15%	15%	6%	10%	%
Total Equity	65%	45%	35%	24%	10%	%
Core Bonds	0%	0%	6%	16%	30%	%
Private Credit	6%	6%	4%	0%	0%	%
TIPS	3%	5%	8%	10%	15%	%
Emerging Market Debt	3%	3%	3%	0%	0%	%
Opportunistic Fixed Income	3%	5%	9%	16%	35%	%
Total Fixed Income	15%	19%	30%	42%	80%	%
Private Equity	10%	10%	5%	0%	0%	%
Diversified Alternatives	10%	16%	15%	14%	0%	%
Total Alternatives	20%	26%	20%	14%	0%	%
Global Asset Allocation	0%	10%	15%	20%	10%	%
Total Other	0%	10%	15%	20%	10%	%

Please Note: All investment allocations are reviewed and must be approved by the Barnabas Foundation's Director of Investment Services.

By signing below you acknowledge that you have read and understood all the provisions of this form and have received the "Disclosure Document on the Barnabas Foundation Common Trust Fund."

 Signature of Grantor

 Signature of Grantor

 Name of Grantor

 Name of Grantor

 Date

 Date