

Donor Recommendation of Investment Allocation

For Stewards Fund and Restricted Fund (Designated Fund) Accounts

This form enables you to recommend a diversified investment allocation for your Stewards Fund or Restricted Fund account. Please check one of the investment allocations in the Investment Preference section below. If you prefer to recommend an investment allocation different than one of the Barnabas Foundation recommended investment allocations, enter the desired percentages in the Customized column. Please sign and return the form to us.

Name(s) of account _____ Account # _____

AMOUNT TO LEAVE IN THE CASH EQUIVALENTS FUND: _____%

INVESTMENT PREFERENCE

____ I (We) understand the risks of investing and recommend the investment allocation of my (our) account as indicated below.

Please check one of the following:

Name of Fund	<input type="checkbox"/> Aggressive Growth	<input type="checkbox"/> Long term Growth	<input type="checkbox"/> Balanced	<input type="checkbox"/> Conservative	<input type="checkbox"/> Income	<input type="checkbox"/> Customized*
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.

Signature Primary Advisor

Signature of Additional Primary Advisor

Name of Primary Advisor

Name of Additional Primary Advisor

Date

Date