



# Oregon Jewish Community Foundation

## Investment Allocation Form

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

Fund ID Number: (office use only) \_\_\_\_\_

Please choose from one section only:

Strategy A – (Standard Portfolio Choices)

You may select from one of the OJCF's Investment Committee recommendations:

- 100% Money Market
- Aggressive (70% Equity pool, 30% Fixed pool)
- Balanced (60% Equity pool, 40% Fixed pool)
- Conservative (30% Equity pool, 70% Fixed pool)

OR:

Strategy B – (Custom Portfolio Choices)

You may select your own strategy (please fill in percentages):

\_\_\_\_\_ % Money Mkt    \_\_\_\_\_ % S&P500    \_\_\_\_\_ % Equities    \_\_\_\_\_ % Fixed

Please note: The OJCF asks that an estimate of money you have budgeted to spend in the current year be allocated to your Money Market account.

Advisor Signature(s):

\_\_\_\_\_  
\_\_\_\_\_