

INVESTMENT RECOMMENDATION FORM

AGENCY FUNDS



Foundation For The Carolinas offers fundholders diverse investment options to grow fund assets for maximum philanthropic impact. Please select one of the following investment pools based on the anticipated needs for your agency fund. *Please note: The initial selection of, or requested changes to, your fund's investment pool will generally take effect within 10 business days after your completed form is received.*

For additional information on FFTC's investment pools, visit www.fftc.org/pools.

Investment Pools

Fund Type

		Non-Endowed	Quasi-Endowed	Endowed
<input type="checkbox"/>	Liquid Reserves	✓		
<input type="checkbox"/>	Low Duration Fixed Income	✓		
<input type="checkbox"/>	Income & Growth	✓		
<input type="checkbox"/>	Passive Long-Term Growth	✓	✓	✓
<input type="checkbox"/>	ESG Long-Term Growth	✓	✓	✓
<input type="checkbox"/>	Active Long-Term Growth	✓	✓	✓
<input type="checkbox"/>	Diversified Long-Term Growth	✓*	✓*	✓

*Restrictions on withdrawals apply depending upon the fund balance. Less than \$1M – available within 90 days; \$1M - \$5M – 80% available within 90 days, remainder within 1YR; Greater than \$5M, please contact relationship manager.

Anticipated Distribution Horizon (in years)



By signing below, I (we) understand that all agency funds are subject to the policies of Foundation For The Carolinas as set forth in the Charitable Giving Guide and if applicable, understand the liquidity terms described above. The investment recommendation selected above includes careful consideration of the anticipated annual spending and distribution plans for the agency fund.

Agency Fund Name & Number: _____

Signature of Representative: _____

Print name: _____ Date: _____

Please email the completed form to investments@fftc.org.

Foundation For The Carolinas does not provide tax, legal or investment advice. The information in our publications and on our website is general in nature, and is not intended to be a substitute for consulting your legal, tax or investment advisor regarding your particular situation. Any performance data is based on past performance and is no guarantee of future results.