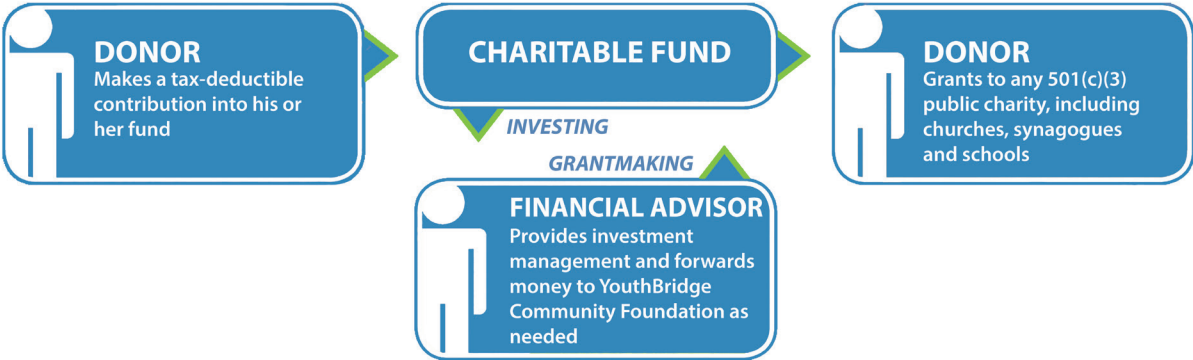


## Investment Recommendation Form

YouthBridge Community Foundation's investment program offers the flexibility to customize your fund's investments to meet your charitable goals, whether they are immediate or long term. When working with YouthBridge you can choose to work with your trusted Financial Advisor or use YouthBridge Community Foundation's investment pools.

### OPTION 1: Have Your Trusted Financial Advisor Manage Your Fund

With this option you can benefit from customized investment management by an advisor you already know and trust.



If this option is right for you, simply complete page 2 of this document and put YouthBridge Community Foundation in touch with your financial advisor. Our team will take care of the rest.

### OPTION 2: Use YouthBridge Community Foundation's Investment Pools

YouthBridge Community Foundation's investment pools allow you to match your investment strategy with your risk tolerance and long-term objectives for your fund. The pools are organized according to asset class and include the following: Money Market, Short-Term Fixed Income, Intermediate-Term Fixed Income and Equity.

You may change your investment options monthly. Investment change request forms received five business days prior to the end of the month will take effect on the first of the following month.

For pooled investment funds and back office administrative services, YouthBridge has chosen to partner with Greater Horizons. Greater Horizons provides administrative services on more than two billion dollars in charitable assets for endowments and foundations across the United States.

If this option is right for you, simply complete page 3 of this document. Our team will take care of the rest.

## OPTION 1: Working With Your Financial Advisor

- Yes! I want my fund advised by the financial advisor listed below. By checking this box, until otherwise notified by the Gift Advisor(s), the financial advisor may have online viewing access to the fund.**

I (we), the undersigned, would like to establish a segregated fund that is managed directly by:

\_\_\_\_\_  
Financial Advisor Name

\_\_\_\_\_  
Firm Name

\_\_\_\_\_  
Address

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

\_\_\_\_\_  
City State Zip Code

\_\_\_\_\_  
Phone

My (our) financial advisor will participate in the YouthBridge Community Foundation's Financial Advisor Program until such time that YouthBridge Community Foundation or I (we) exercise the option to make a different selection for management of this fund. As a participant in the Financial Advisor Program, I (we) understand that my (our) elected financial advisor will be responsible for the management of the assets of this fund, and he/she will do so in accordance with the most current financial policies and standards of YouthBridge Community Foundation.

**As required by IRS regulations, I (we) acknowledge and agree that:**

- a) the above recommendation is advisory only and YouthBridge Community Foundation may, at its sole and absolute discretion, follow or decline to follow my (our) recommendation;
- b) YouthBridge Community Foundation may at any time, at its sole and absolute discretion, change the investment of all or any portion of the assets in the fund;
- c) if my (our) recommendation is accepted, the investments will be administered in accordance with the financial policies and fiduciary standards of YouthBridge Community Foundation; and
- d) investments are subject to normal market and interest rate fluctuation risks, and any gain or loss generated by the above investments will be credited or charged to the fund.

\_\_\_\_\_  
**Your Name**

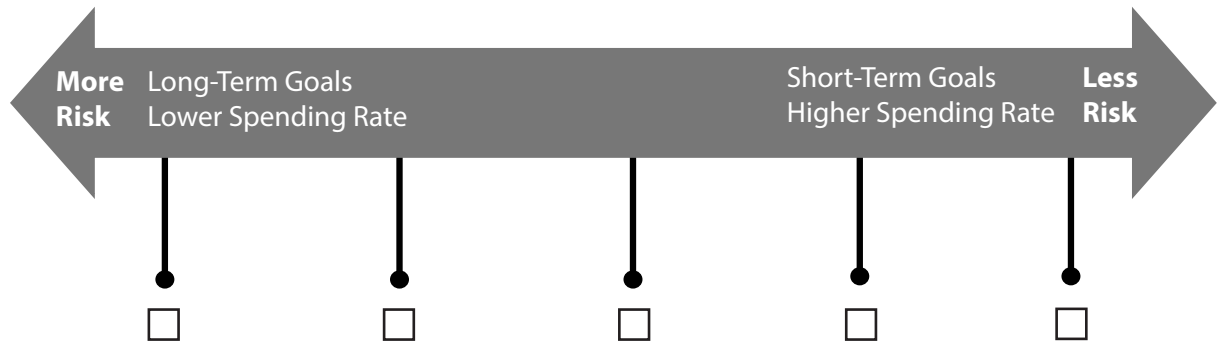
\_\_\_\_\_  
**Your Fund's Name**

\_\_\_\_\_  
**Signature**

\_\_\_\_\_  
**Date**

## OPTION 2: Investment Pools

To invest in YouthBridge Community Foundation's investment pools, please select one mix from the options listed below, or create your own mix in the space provided. The pre-set asset allocation mixes offer a simple, one stop approach to an investment strategy that best reflects your investment philosophy and charitable goals. Do not complete this section if you are recommending an investment advisor under Option 1 on the previous page.



Investment Pool	Aggressive	Moderately Aggressive	Moderate	Conservative	Risk Averse
Money Market	0%	5%	15%	25%	100%
Short-Term Fixed Income	10%	21%	27%	33%	0%
Intermediate-Term Fixed Income	10%	14%	18%	22%	0%
Equity	80%	60%	40%	20%	0%

### Create Your Own Investment Mix

Money Market Pool	%
Short-Term Fixed Income Pool	%
Intermediate-Term Fixed Income Pool	%
Equity Pool	%
Combined Total Must Equal 100%	%

#### As required by IRS regulations, I (we) acknowledge and agree that:

- the above recommendation is advisory only and YouthBridge Community Foundation may, at its sole and absolute discretion, follow or decline to follow my (our) recommendation;
- YouthBridge Community Foundation may at any time, at its sole and absolute discretion, change the investment of all or any portion of the assets in the fund;
- if my (our) recommendation is accepted, the investments will be administered in accordance with the financial policies and fiduciary standards of YouthBridge Community Foundation ; and
- investments are subject to normal market and interest rate fluctuation risks, and any gain or loss generated by the above investments will be credited or charged to the fund.

\_\_\_\_\_  
Your Name

\_\_\_\_\_  
Your Fund's Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Please complete the form and return it in one of the following ways: mail to 12685 Olive Boulevard, St. Louis, MO 63141, fax to 636-634-3411, or scan and email to [operations@youthbridge.org](mailto:operations@youthbridge.org)