



Investment Recommendations
(For Initial and Additional Contributions)

DAF Account Name: _____ Account No: _____

Investment Recommendations

The Rotary Foundation invests its assets held in the Donor Advised Fund (“DAF”) in a combination of four investment portfolios, each of which is managed by Boston Private Bank & Trust Company. Each investment portfolio will be managed in keeping with the investment objectives described in The Rotary Foundation Donor Advised Fund Program Circular.

Account holders may recommend how their contributions to the DAF account fund should be allocated among the four investment portfolios. Please note that the investment preferences are recommendations only; The Rotary Foundation DAF retains the final authority to determine the investment of all DAF account assets. If you do not make an investment recommendation, your contributions will be allocated to the Capital Preservation portfolio. Please indicate your investment preferences below:

Investment Portfolio Name	Recommended Percentage	If this is an additional contribution, please complete the following:	
Growth		Type of Gift	Cash Stocks
Moderate		Amount of Gift	\$ _____
Conservative		If other than cash or stocks, please describe:	
Capital Preservation			
<i>Total (Must equal 100%)</i>			

Signature _____

Signature _____
(if applicable)

Signature _____
(if applicable)

Signature _____
(if applicable)

Return this form with DAF application and/or contribution to:

Rotary DAF
c/o NRS
4A Gill Street
Woburn, MA 01801

You may also make contributions and investment recommendations through your online account.