

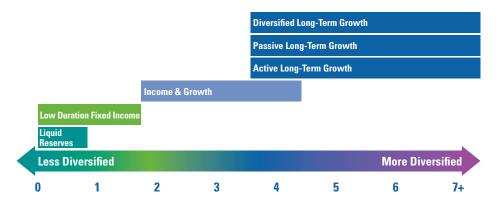
## INVESTMENT RECOMMENDATION FORM AGENCY FUNDS

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 5 - 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		
		${\it Non-Endowed}$	Quasi-Endowed	Endowed
	Liquid Reserves	✓		
	Low Duration Fixed Income	✓		
	Income & Growth	✓		
	Passive Long-Term Growth (formerly Passive Diversified)	✓	✓	✓
	Active Long-Term Growth (formerly Moderate Growth)	✓	✓	✓
	Diversified Long-Term Growth (formerly Endowed & NonEndowed)	<b>√</b> ∗	<b>√</b> *	✓

## 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:					
Drint name:	Data				

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.

<sup>\*</sup>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 4M - 4M please contact relationship manager.