



# OJCF

Oregon Jewish  
Community Foundation

## INVESTMENT ALLOCATION RECOMMENDATION FORM

(Please return by the 5<sup>th</sup> or 20<sup>th</sup> of the month for processing in the next rebalance cycle)

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

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

Please choose from one section only:

### Standard Portfolios

I would like to change my asset allocation to one of these board-recommended asset allocations/pool.  
Choose only one option:

- ☐ Balanced\* (60% Equity/40% Fixed Income)
- ☐ Aggressive (75% Equity/25% Fixed Income)
- ☐ Conservative (40% Equity/60% Fixed Income)
- ☐ 100% Money Market

*\*Balanced is the OJCF recommended endowment asset allocation.*

OR

### Custom Portfolio

____ % Equity	____ % ESG Equity
____ % S&P 500 Index	____ % ESG Fixed Income
____ % Fixed Income	____ % Jewish Advocacy Strategy Pool
____ % Total Bond Index Pool	____ % Money Market
____ % International Equity Index	____ % Short Term Bond Index Pool

\_\_\_\_\_  
Signature of Donor Advisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Donor Advisor

\_\_\_\_\_  
Date

*Please print, sign and return to OJCF or contact us to request a DocuSign for digital signature.*