



DAF Account Name: _____ Account No: _____

Investment Recommendations

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

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

Investment Portfolio Name	Recommended Percentage		Cash	Stock
Growth		Amount	\$	\$
Moderate				
Conservative				
Capital Preservation				
Total (Must equal 100%)				

If contribution is other than cash or stock, please describe:

The allocation recommended above will apply to **this contribution** and **all future contributions**, but not to assets currently held in this account, unless one of the following alternatives is selected:

- Please apply this recommendation to all assets currently held in this account and all future contributions (rebalance account assets).
- Please apply this recommendation to this contribution only, and not to future contributions.

Signature _____ Signature _____
(if applicable)

Signature _____ Signature _____
(if applicable) *(if applicable)*

Return this form to:
Rotary DAF
c/o NRS
4A Gill Street
Woburn, MA 01801
Fax (781)970-5088