

# Endowment Investment Change Request Form

Account Name \_\_\_\_\_

Account No. \_\_\_\_\_ Amount Requested \_\_\_\_\_

## INVESTMENT SELECTION:

<b>FUND</b>	<b>Percent %</b>
<input type="checkbox"/> Blended Portfolio (approximately 60% stock, 40% fixed income)	_____ %
<input type="checkbox"/> Stock Portfolio (all stock)	_____ %
<input type="checkbox"/> Fixed Income Portfolio (all fixed income)	_____ %

Telephone No. \_\_\_\_\_

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

Print Full Name \_\_\_\_\_

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Full Name #2 (if applicable) \_\_\_\_\_

Authorized Signature #2 (if applicable) \_\_\_\_\_ Date \_\_\_\_\_

### **\*\*IMPORTANT\*\***

*Please include a copy of the Board minutes confirming the approved investment changes.*

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