

DAF Investment Change Form

RAYMOND JAMES *Charitable*

RJ Charitable

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Please use this form to recommend a change to your target allocation.

To change from Liberty to the Investment Advisor Program (IAP) please complete form 2784

ACCOUNT INFORMATION

RJ Charitable DAF Account Name

DAF Fund ID #

Please select the new investment strategy you would like below

SELECT ONE

LIBERTY INVESTMENT OPTION: FOR ACCOUNT BALANCES OF ANY SIZE

- ▶ MONEY MARKET OBJECTIVE: Seeks the preservation of capital and the production of income exclusively through investment in a money market fund investing in the highest quality, very short-term debt instruments.
- ▶ INCOME OBJECTIVE: Seeks income and capital preservation primarily through the use of a mutual fund portfolio consisting of exposure to U.S. government and global corporate bonds.
- ▶ INCOME WITH GROWTH OBJECTIVE: Seeks income and provides a growth component through the use of a mutual fund portfolio consisting of exposure to U.S. government and global corporate bonds and a modest exposure to diversified common stocks.
- ▶ BALANCED OBJECTIVE: Seeks to provide a balanced allocation through the use of a mutual fund portfolio providing both growth and income.
- ▶ GROWTH WITH INCOME OBJECTIVE: Seeks long-term growth of capital primarily by investing in a diversified mutual fund portfolio consisting of equity exposure and income through the use of U.S. government and global corporate bonds.
- ▶ GROWTH OBJECTIVE: Seeks long-term growth of capital primarily by investing in a diversified mutual fund portfolio consisting of equity exposure across market capitalization and growth spectrums, including prudent exposure to international markets.
- ▶ ENVIRONMENTAL, SOCIAL & GOVERNANCE (ESG) BALANCED OBJECTIVE: Seeks long-term capital appreciation with strong growth potential through investments with best-in-class environmental, social and governance practices.

INVESTMENT ADVISOR PROGRAM (IAP) OPTION: FOR ACCOUNT BALANCES OF \$500,000 OR MORE

- ▶ Please change my current IAP investment allocation target to:

Please select one: Income (0-20% equity) Income Primary (21-40% equity)
 Balanced (41-60% equity) Growth Primary (61-80% equity) Growth (81-100% equity)

Note: when completing this form, all active donors listed on the account are required to sign.

SIGNATURES*

Donor Advisor Signature (Required)	Date	Joint Donor Advisor Signature (if applicable)	Date
Additional Donor Advisor Signature (if applicable)	Date	Additional Donor Advisor Signature (if applicable)	Date

Please contact RJCHARITABLE@RAYMONDJAMES.COM or 866-687-3863 or ext 77221 with any questions.