

# DAF Investment Change Form

**RAYMOND JAMES Charitable**

RJ Charitable

Service Center

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Form #

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Use this form to submit a recommended change to the investment option of a DAF.

## ACCOUNT INFORMATION

DAF Fund ID #

RJ Charitable DAF Account Name

Please fill out either the Liberty Mutual Fund Objective section OR the Investment Advisor Program (IAP) section.

### LIBERTY OBJECTIVES - FOR ACCOUNT BALANCES OF ANY SIZE

- ☐ **Money Market** Objective - [View objective and performance](#)
- ☐ **Income** Objective - [View objective and performance](#)
- ☐ **Income with Growth** Objective - [View objective and performance](#)
- ☐ **Balanced** Objective - [View objective and performance](#)
- ☐ **Growth with Income** Objective - [View objective and performance](#)
- ☐ **Growth** Objective - [View objective and performance](#)
- ☐ **Environmental, Social & Governance (ESG) Balanced** Objective - [View objective and performance](#)

OR

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

- ☐ **This request is to change a current IAP DAF from one investment target allocation to another.** (Please select the new investment target allocation below).

OR

- ☐ **This request is to change a Liberty DAF to IAP,** using the investment target allocation selected below.

The Financial Advisor Fee for this DAF account shall be: \_\_\_\_\_ % (may not exceed 1.0%).<sup>1</sup>

Please select one IAP investment target allocation:

- ☐ **Income** (0-20% equity)
- ☐ **Income Primary** (21-40% equity)
- ☐ **Balanced** (41-60% equity)
- ☐ **Growth Primary** (61-80% equity)
- ☐ **Growth** (81-100% equity)

- ☐ Check here to attest that the financial advisor(s) has read, understands and agrees to comply with the [IAP Investment Guidelines](#), the [Raymond James Charitable Financial Advisor Acknowledgment](#) and the [Raymond James Charitable Donor Advised Fund Program Guidelines](#).

## SIGNATURES

By signing below, the financial advisor confirms that the financial advisor is submitting the above recommendation at the request of and on behalf of the donor advisor(s) of the above-named DAF account.

Financial Advisor Signature

Date

Please contact [RJCharitable@RaymondJames.com](mailto:RJCharitable@RaymondJames.com) or 866-687-3863 or with any questions.

<sup>1</sup>Depending on the investment approach chosen, additional fees and expenses may apply. These may include mutual fund expense ratios, or third-party manager fees (i.e. AMS, RJCS, Eagle). The Financial Advisor is responsible for disclosing the investment plan and any additional fees, if applicable, to the donor advisor(s).