

DAF Investment Change Form

RAYMOND JAMES Charitable

RJ Charitable
Service Center
eSign Scan / Fax

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Form #

FA #

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Please use this form to change 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)

SIGNATURES

Donor Signature

Date

Joint Donor Signature

Date

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