

ACCOUNT INFORMATION

Account name

Account number

Your request for a change must be approved by the RJCEF Board of Directors prior to the change being made. The RJCEF Board of Directors meets on a November, February, May, August cycle. We ask that any requests be submitted by the end of the month prior to the meeting for inclusion on the agenda.

LEVEL ONE: FOR CONTRIBUTIONS BELOW \$100,000:

Please check one.

- 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 the market capitalization and growth spectrums, including prudent exposure to international markets.

LEVEL TWO: FOR CONTRIBUTIONS OF \$100,000 OR MORE :

For contributions of \$100,000 or more, you may select one (1) investment mutual fund objective from Level One above or check the box below to build you own investment allocation model.

- I/We want to build our own investment allocation model.**
Complete and attach an Individual Investment Allocation Investment form. Your financial advisor can provide you with this form as well as additional information about RJ Investments.

LEVEL THREE: FOR CONTRIBUTIONS OF \$500,000 OR MORE :

For contributions of \$500,000 or more, you may select one (1) investment mutual fund objective from Level One or Level Two above or check the box below to choose the Raymond James Consulting Services approach.

- I/We want to use the Raymond James Consulting Services approach.**
Complete and attach a Request for Change of Investment form. Your financial advisor can provide you with this form as well as additional information about RJ Investments.

Notes:

SIGNATURES

Donor signature

Dated

Joint donor

Dated

Please print name

Please print name