

ACCOUNT INFORMATION

Account name \_\_\_\_\_

Account number \_\_\_\_\_

NEW INVESTMENT OBJECTIVE

**FOR CONTRIBUTIONS UNDER \$500,000:**

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.

**FOR CONTRIBUTIONS OF \$500,000 OR MORE:**

For contributions of \$500,000 or more, you may select one (1) investment objective from the list above or choose from the following two investment approaches.

Please check one:

- I/We want to use the Raymond James Consulting Services approach.**  
Complete and attach a Raymond James Consulting Services (RJCS) Investment Policy Questionnaire. Your financial advisor can provide you with this form as well as additional information about RJCS.

- I/We want to select from the separately-managed accounts listed below.**

From the list below, insert percentages in multiples of 5% for each of the assets you wish to have your contribution invested in. The total should equal 100%. (Total recommendation in any single managed fund must equal or exceed \$100,000, with the exception of Eagle Asset Management Special Fixed Income, which requires a minimum investment of \$350,000.)

ASSET CHOICES	ALLOCATION %
Eagle Asset Management, Inc. U.S. Government Securities	_____ %
Western Asset Management, Inc. Taxable Fixed Income	_____ %
Eagle Asset Management, Inc. Intermediate Conservative Taxable	_____ %
Eagle Asset Management, Inc. Special Fixed Income (Max. 20%)	_____ %
<i>NOTE: The EAM Special Fixed Income choice requires a minimum investment of \$350,000</i>	
Eagle Asset Management, Inc. Equity Income (Max. 20%)	_____ %
Atlanta Capital Management Co., LLC Large-cap Growth Equity	_____ %

Additional asset choices are listed on the back of this page.

FOR CONTRIBUTIONS OF \$500,000 OR MORE

From the list below, insert percentages in multiples of 5% for each of the assets you wish to have your contribution invested in. The total of all selections (from both pages) should total 100%. (Total recommendation in any single managed fund must equal or exceed \$100,000.)

ASSET CHOICE	ALLOCATION %
Eagle Asset Management, Inc. Large-cap Core	_____ %
Davis Advisers Large-cap Value Blend	_____ %
Eagle Asset Management, Inc. Large-cap Value Equity	_____ %
Lazard Asset Management International Large-cap Value Blend	_____ %
Eagle Boston Investment Management Small-cap Value Blend	_____ %
Eagle Asset Management, Inc. Small/Mid-cap Core Equity (Max. 20%)	_____ %
	Total = 100%

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SIGNATURES

\_\_\_\_\_  
Donor signature

\_\_\_\_\_  
Joint donor

\_\_\_\_\_  
Please print name

\_\_\_\_\_  
Please print name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date