



AGREEMENT ESTABLISHING A DONOR ADVISED FUND

Name of the Fund: _____

Name of Advisor(s): _____

Advisor(s) Contact Info: _____

Name of Advisor(s): _____

Advisor(s) Contact Info: _____

Name of Successor Advisor(s): _____

Successor Advisor(s) Info: _____

Investment Options: Choose an investment account

- Mid-to-Long Term Fund** – A diversified global strategic approach featuring a blend of active, passive and private investment funds including real estate and private equity investments.
- Blue Marble Fund** – A lower cost strategy comprised of ETFs and Mutual Funds focused on investing in companies with best practices related to environmental, social and governance attributes.
- Indexed Fund** – A diversified 60% stock and 40% fixed income portfolio invested in highly liquid exchange traded with exceptionally low internal-fund costs.
- Short-term Fund** – A short-term bond fund managed by PIMCO, with the primary goal of minimizing principal loss. Interest is earned on balances of \$50k or higher.

Become a Community Cornerstone:

Support OICF with an annual commitment of at least \$1,000. Admin fees for Cornerstones are waived.

- Yes! I would like to become a Cornerstone. Please designate \$_____ from my DAF once it is established.
- I am already a Cornerstone.
- No, I am not interested at this time.

By: _____, Date _____

By: _____, Date _____