



## **AGREEMENT FOR ESTABLISHING A FUND AT OICF**

**Type of Fund:**    Endowment    Designated Fund    Unrestricted

Name of the Fund: \_\_\_\_\_

Organization (if applicable): \_\_\_\_\_

Name of Fund Advisor(s): \_\_\_\_\_

Fund Advisor(s) Contact Info: \_\_\_\_\_

Name of Fund Advisor(s): \_\_\_\_\_

Fund Advisor(s) Contact Info: \_\_\_\_\_

Fund may receive donations via OICF website?    Yes    No

**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.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title/Position

*Please tell us more about your fund on the following page*



**Purpose of Fund**

This will appear on the OICF website's list of funds. This should be brief and concise and action-oriented. [View examples on the OICF donation page.](#)

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**Detailed Description for Fund**

This will appear on the fund's online donation page.

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**Fund Logo/Image**

Please send a logo or image in .png or .jpeg format along with this completed form to [lindsay@oicf.us](mailto:lindsay@oicf.us). Image will appear on the OICF fund list and the fund's donation page. [View examples on the OICF donation page.](#)