



Fund name: _____ Fund #: _____ Date: _____

As the duly appointed signatories of this fund Organization, we hereby certify the following change in investment/spend strategy for this fund. Only the number of required signatories on your fund agreement need to sign. We understand that **this/these change(s) will take place as soon as possible after this signed form is scanned and emailed to CFSWIA at contact@cfswia.org.**

We cannot accept investment/spend changes over the phone or via email. A change form must be submitted for each investment change you request.

Each of our signature(s) below is/are the **portfolio/spend revisions** we wish at this time for the fund listed above.

Signatory #1 Full name *printed*

Signatory #1 signature

Signatory #2 Full name *printed*

Signatory #2 signature

Signatory #3 Full name *printed*

Signatory #3 signature

Signatory #4 Full name *printed*

Signatory #4 signature

CURRENT ASSET ALLOCATION

(Find your current allocation on your online portal) Strategic

Growth Investment Portfolio: 60% Global Equity, 20%,
Alternatives, 20% Global Fixed Income _____%

Moderate Growth Investment Portfolio: 50% Global Equity, 25%
Alternatives, 25% Fixed income _____%

Capital Reserve Investment Portfolio: 50% Global Fixed income,
50% Cash _____%

The top three can be separate or mixed but must equal 100%

Money Market Investment Portfolio: 100% invested in
Government Obligations Money Market Fund _____%

You cannot mix the money market with any other portfolio

*all underlying investment types may change based on markets

Current Spend Policy:

REVISED ASSET ALLOCATION REQUESTED

Strategic Growth Investment Portfolio: 60% Global Equity, 20%
Alternatives, 20% Global Fixed Income _____%

Moderate Growth Investment Portfolio: 30% Global Equity, 20%
Alternatives, 40% Fixed income, 10% Cash* _____%

Capital Reserve Investment Portfolio: 50% Global Fixed income,
50% Cash _____%

The top three can be separate or mixed but must equal 100%

Money Market Investment Portfolio: 100% invested in
Government Obligations Money Market Fund _____%

You cannot mix the money market with any other portfolio

*all underlying investment types may change based on markets

New Spend Policy:

Do you want this change to be dollar cost averaged over a specified period of time? If yes, please specify those details. Questions? Call us.