



## Investment Pool Change Form

Seattle Foundation Philanthropic Partners may request a change to their investment pools no more than once in a 12-month period during two windows annually: 1. on or before March 31, with transfer happening no later than May 31; or 2. on or before August 31, with transfer happening no later than October 31. Please note endowed funds are solely invested in the Balanced Pool.

To request a change to your fund's investment pool, please provide the following information:

Name of fund: \_\_\_\_\_

### DONOR INFORMATION

Name \_\_\_\_\_

Mailing Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Primary Phone \_\_\_\_\_  cell  home  business  other \_\_\_\_\_ (check one)

Email \_\_\_\_\_

I would like to change my fund's investment pool to:

- |                                            |                                                               |
|--------------------------------------------|---------------------------------------------------------------|
| <input type="checkbox"/> Short-Term Pool   | <input type="checkbox"/> Socially Responsible Investment Pool |
| <input type="checkbox"/> Intermediate Pool | <input type="checkbox"/> Balanced Pool                        |
| <input type="checkbox"/> Index Pool        | <input type="checkbox"/> Growth Pool                          |

Please make this change to my investment pool during the following window:

- September 1-March 31, with transfer happening no later than May 31  
 April 1-August 31, with transfer happening no later than October 31

Donor Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*for internal use only:*

Acknowledged by:	Date:
PS Advisor:	
F&O:	