

Request for Change of Investment Form

RAYMOND JAMES Charitable

RJ Charitable
Service Center
eSign / Scan / Fax

0 2 7 8 7

Form #

FA #

Branch #

Speed Dial #

ACCOUNT INFORMATION

Account name

Account number

Your request for a change must be approved by the RJCEF Board of Directors prior to the change being made. The RJCEF Board of Directors meets on a November, February, May, August cycle. We ask that any requests be submitted by the end of the month prior to the meeting for inclusion on the agenda.

SELECT ONE

LIBERTY MUTUAL FUND OPTION FOR ACCOUNT BALANCES OF ANY SIZE

- ▶ 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 market capitalization and growth spectrums, including prudent exposure to international markets.
- ▶ ENVIRONMENTAL, SOCIAL & GOVERNANCE (ESG) BALANCED OBJECTIVE: Seeks long-term capital appreciation with strong growth potential through investments with best-in-class environmental, social and governance practices.

INVESTMENT ADVISOR PROGRAM (IAP) OPTION FOR ACCOUNT BALANCES OF \$500,000 OR MORE

- ▶ I/WE WANT TO NOMINATE MY/OUR FINANCIAL ADVISOR TO PROVIDE INVESTMENT ADVICE TO RAYMOND JAMES TRUST: Complete and attach an Investment Advisor Program (IAP) Agreement if not previously provided. Your financial advisor can provide you with this form and information about this investment approach.

IAP Investment allocation target (*please select one objective*): Income (0-20% equity) Income Primary (21-40% equity)
 Balanced (41-60% equity) Growth Primary (61-80% equity) Growth (81-100% equity)

SIGNATURES

Donor Signature

Date

Joint Donor Signature

Date

Please contact RJCHARITABLE@RAYMONDJAMES.COM or 866-687-3863 or ext 77221 with any questions.