

Investment Pool Worksheet

Napa Valley Community Foundation seeks to ensure that each Fund is invested in the pool that best matches the donor's time horizon for distributions and philanthropic goals. Please visit [this page](#) of our website to see investment performance information on the pools below, or to review a copy of our Investment Policy.

Please indicate your investment pool recommendation based on your expected time horizon for distributions and philanthropic goals. You can change your investment recommendation once per year upon written request.

| Annual Grant Payout | Recommended Investment Pool | Time Horizon for the Fund's Assets |
|---------------------|-----------------------------|---|
| 5% | Long Term Pool | Distributions over 5-10 or more years, creation of a permanent endowment or Legacy Fund |
| 5% < x < 20% | Intermediate Term Pool | The Fund is likely to be expended within 1.5 to 5 years. |
| 20% < x < 100% | Short Term Pool | The Fund is likely to be expended in less than 1.5 years. |

_____ % **Long Term Pool**

_____ % **Intermediate Term Pool**

_____ % **Short Term Pool**

Please note: Any additional gifts to your Fund will be allocated according to the pools recommended above, unless otherwise requested in writing.

Name of Fund: _____ Date: _____

Donor
Signature(s): _____

Foundation Staff
Signature: _____