

Investment Reallocation Selection Form

You may recommend your account to be reallocated across the following investment options. Combined percent allocations should total 100%. Please refer to the Investment Supplement before making your selections.

Account Name

Account ID

ImpactAssets Impact Portfolio Investment Options

- ___% **Liquid Impact Portfolio:** Investment Horizon: 0-12 Months; Cash equivalents and short-term fixed income.
- ___% **Conservative/Short-term Portfolio:** Investment Horizon: 1-3 Years; U.S. short-term bonds and higher yielding private debt.
- ___% **Moderate/Mid-term Portfolio:** Investment Horizon: 3-5 Years; Balanced portfolio of global stocks, bonds and private debt.
- ___% **Aggressive/Long-term Portfolio:** Investment Horizon: 5-7 Years; Diversified investment portfolio of global stocks, bonds and private debt & equity.
- Choose Your Own Allocation**

Choose Your Own Allocation:

- ___% Calvert Impact Capital Women Investing in Women Initiative "WIN-WIN"
- ___% ImpactAssets Community Investment Strategy
- ___% ImpactAssets Liquid Impact Portfolio

Equity

- ___% Calvert Small Cap
- ___% Calvert U.S. Large Cap Core Responsible Index
- ___% DFA U.S. Sustainable Core 1 Fund

Fixed Income

- ___% Access Capital Community Investment Fund
- ___% Calvert Short Duration Income
- ___% Calvert Bond Fund

International Equity

- ___% DFA International Sustainable Core 1 Fund
- ___% PAX MSCI International ESG Index Fund

Thematic

- ___% SPDR MSCI ACWI Low Carbon Target ETF
- ___% Versus Capital Multi-Manager Real Estate Income Fund

Private Debt & Equity "Direct Impact" Investment Options (with additional fees)

- Private Debt & Equity Direct Impact Funds (10,000 minimum recommendation.)
- Custom Investments (\$25,000 minimum recommendation.)

Please contact me to discuss Private Debt & Equity "Direct Impact" Investment Options.

Please note, only Financial Advisors with full-access (not read-only access) can sign off on investment changes.

Donor/Financial Advisor Signature

Name (Please Print)

Date