



## Investment Goals Evaluation for Endowment and Reserve Funds

Account #: \_\_\_\_\_

Name of Fund(s) \_\_\_\_\_

Purpose of Fund(s) \_\_\_\_\_

### *Investment Goals (Circle One)*

**Investment Emphasis/Need**  
Do you need current income, growth of capital or combination of both?

Maximum Growth      Growth      Growth & Income

**Time Horizon**  
When must this goal be reached?  
How many years before the money is needed?

More than 15 years      11-15 years      6 – 10 years      3 -5 years

**Risk Tolerance**  
We are willing to tolerate short-term decline in the value of invested capital in order to achieve higher long-term returns.

Strongly Agree      Agree      Agree Somewhat      Disagree

**Return Expectations**  
In pursuit of long-term returns we are willing to Accept annual returns that may vary greatly.

Strongly Agree      Agree      Agree Somewhat      Disagree

**Inflation Concern**  
What is your level of concern over the future of Impact of inflation on your investment returns?

Very High      High      Medium      Low

Date: \_\_\_\_\_

Church name: \_\_\_\_\_

Address: \_\_\_\_\_

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

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

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