

California – Nevada United Methodist Foundation

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, or growth of capital? A combination of both?

Maximum
Growth

Growth

Growth & Income
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: _____