

# DONOR ADVISED FUNDS INVESTMENT ALLOCATION WORKSHEET



Please select your investment model(s) by indicating the % you would like invested in each model. **Be sure your selection totals 100%.** Return your completed form to Patricia Quarles, email [pquarles@jewishphilly.org](mailto:pquarles@jewishphilly.org) or mail to: Jewish Federation of Greater Philadelphia, Attention: Jewish Community Foundation, Two Commerce Square, 2001 Market Street, Suite 2300, Philadelphia PA 19103

Investment Model	Fund Name / Symbol	% to be Invested
<b>Money Market Fund</b>	100% Allspring Treasury Plus MM Fd-Inst (PISXX)	<input type="text"/> %
<b>Conservative Income (9/86/5) *</b>		<input type="text"/> %
Domestic Equity	7% Vanguard Total Stock Market Index-Admiral (VTSAX)	
International Equity	2% Vanguard Developed Markets Index-Admiral (VTMGX)	
Fixed Income	65% Vanguard Total Bond Market Index-Admiral (VBT LX)	
Fixed Income	21% Vanguard Short-Term Bond Index-Admiral (VBIRX)	
Money Market	5% Allspring Government MM Fd-Inst (GVIXX)	
<b>Conservative G&amp;I (35/63/2) *</b>		<input type="text"/> %
Domestic Equity	25% Vanguard Total Stock Market Index-Admiral (VTSAX)	
International Equity	10% Vanguard Developed Markets Index-Admiral (VTMGX)	
Fixed Income	63% Vanguard Total Bond Market Index-Admiral (VBT LX)	
Money Market	2% Allspring Government MM Fd-Inst (GVIXX)	
<b>Balanced G&amp;I (53/45/2) *</b>		<input type="text"/> %
Domestic Equity	40% Vanguard Total Stock Market Index-Admiral (VTSAX)	
International Equity	13% Vanguard Developed Markets Index-Admiral (VTMGX)	
Fixed Income	45% Vanguard Total Bond Market Index-Admiral (VBT LX)	
Money Market	2% Allspring Government MM Fd-Inst (GVIXX)	
<b>Balanced Growth (70/28/2) *</b>		<input type="text"/> %
Domestic Equity	51% Vanguard Total Stock Market Index-Admiral (VTSAX)	
International Equity	19% Vanguard Developed Markets Index-Admiral (VTMGX)	
Fixed Income	28% Vanguard Total Bond Market Index-Admiral (VBT LX)	
Money Market	2% Allspring Government MM Fd-Inst (GVIXX)	
<b>Growth (86/12/2) *</b>		<input type="text"/> %
Domestic Equity	59% Vanguard Total Stock Market Index-Admiral (VTSAX)	
International Equity	27% Vanguard Developed Markets Index-Admiral (VTMGX)	
Fixed Income	12% Vanguard Total Bond Market Index-Admiral (VBT LX)	
Money Market	2% Allspring Government MM Fd-Inst (GVIXX)	
<b>Domestic Equity Fund (98/2) *</b>		<input type="text"/> %
Domestic Equity	68% Vanguard 500 Index (VFIAX)	
Domestic Equity	20% Vanguard Mid Cap Index (VIMAX)	
Domestic Equity	10% Vanguard Small Cap Index (VSMAX)	
Money Market	2% Allspring Gov MM (GVIXX)	
<b>Israeli ETF (98/2) **</b>		<input type="text"/> %
Israeli Equities	98% BlackRock iShares MSCI Israel ETF (EIS)	
Cash	2% Wells Fargo Bank Deposit Sweep	

\* Equity/Fixed Income/Money Market

\*\* Daily Model trades over \$25,000 may take longer to execute

**Total 100%**

Asset allocations may be changed up to 12 times per year, no more than once per month.

Please note that it could take up to 15 business days to complete reallocations, depending on the type of investment.

Fund Name and Number (please print) \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

This document was prepared in and reflects accurate information as of April 2025. Information contained in this publication is for informational purposes only and should not be construed as legal or tax advice. Consult your lawyer or tax advisor when considering planned giving strategies.