

# DAF Investment Change Form

**RAYMOND JAMES Charitable**

RJ Charitable  
Service Center  
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Form #

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Use this form to submit a recommended change to the investment option of a DAF.

## ACCOUNT INFORMATION

DAF Fund ID #

RJ Charitable DAF Account Name

Please fill out either the Liberty Mutual Fund Objective section OR the Investment Advisor Program (IAP) section.

### LIBERTY OBJECTIVES - FOR ACCOUNT BALANCES OF ANY SIZE

- Money Market Objective - [View objective and performance](#)
- Income Objective - [View objective and performance](#)
- Income with Growth Objective - [View objective and performance](#)
- Balanced Objective - [View objective and performance](#)
- Growth with Income Objective - [View objective and performance](#)
- Growth Objective - [View objective and performance](#)
- Environmental, Social & Governance (ESG) Balanced Objective - [View objective and performance](#)

**OR**

### INVESTMENT ADVISOR PROGRAM (IAP) - FOR ACCOUNT BALANCES OF \$500,000 OR MORE

- This request is to change a current IAP DAF. (Please select the new investment target allocation and/or fee below).

**OR**

- This request is to change a Liberty DAF to IAP. (Please select the new investment target allocation and fee below).

The Financial Advisor Fee for this DAF account shall be: \_\_\_\_\_ % (may not exceed 1.0%).<sup>1</sup>

Please select one IAP investment target allocation:

- Income (0-20% equity)
- Income Primary (21-40% equity)
- Balanced (41-60% equity)
- Growth Primary (61-80% equity)
- Growth (81-100% equity)

- Check here to attest that the financial advisor(s) has read, understands and agrees to comply with the [IAP Investment Guidelines](#), the [Raymond James Charitable Financial Advisor Acknowledgment](#) and the [Raymond James Charitable Donor Advised Fund Program Guidelines](#).

## SIGNATURES

\_\_\_\_\_  
Donor Advisor Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Donor Advisor Signature (if applicable)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Additional Donor Advisor Signature (if applicable)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Additional Donor Advisor Signature (if applicable)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Financial Advisor Signature

\_\_\_\_\_  
Date

Please contact [RJCharitable@RaymondJames.com](mailto:RJCharitable@RaymondJames.com) or 866-687-3863 or with any questions.

<sup>1</sup>Depending on the investment approach chosen, additional fees and expenses may apply. These may include mutual fund expense ratios, or third-party manager fees (i.e. AMS, RJCS, Eagle). The Financial Advisor is responsible for disclosing the investment plan and any additional fees, if applicable, to the donor advisor(s).