Shape, rectangle

Description automatically generated

**INVESTMENT POOL TRANSFER REQUEST: NONPROFITS ≤ $100,000**

Date:

Fund Name:

CHECK ONE:

**Transfer From:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Endowed | |  | Quasi-Endowed | |
| Endowment Pool | ESG Pool |  | Moderate Pool | Conservative Pool |
|  |  |  |  |  |

CHECK ONE:

**Transfer To:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Endowed | |  | Quasi-Endowed | |
| Endowment Pool | ESG Pool |  | Moderate Pool | Conservative Pool |
|  |  |  |  |  |

□ As Advisor to the ­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Friends Fund, we recommend that the Board of Directors of the Greater Cedar Rapids Community Foundation transfer the Friends Fund’s investment pool in accordance with the instructions above.

**Note:** This form must be accompanied by minutes showing approval of the investment pool transfer request by the nonprofit organization’s board.

ACKNOWLEDGEMENT

I understand that the investment pool transfer will be made on the first day of the month following the request. I further understand that only one request can be made per fund per year.

Nonprofit Board Chair Signature

Nonprofit Executive Director Signature

A close-up of a logo

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