

REVOCABLE TRUSTS FOR ORGANIZATIONS ALLOCATION WORKSHEET



Jewish Federation
of Greater Philadelphia

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 by fax 215.832.0714, email pquarles@jewishphilly.org or mail to: Jewish Federation of Greater Philadelphia, Attention: Endowments Department, Two Commerce Square, 2001 Market Street, Suite 2300, Philadelphia PA 19103

Investment Model		Fund Name / Symbol	% to be Invested
Money Market Fund	100%	Allspring Treasury Plus MM Fd-Inst (PISXX)	<input type="text"/> %
Conservative Income (9/86/5) *			<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 (VBTLX)	
Fixed Income	21%	Vanguard Short-Term Bond Index-Admiral (VBIRX)	
Money Market	5%	Allspring Government MM Fd-Inst (GVIXX)	
Conservative G&I (35/63/2) *			<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 (VBTLX)	
Money Market	2%	Allspring Government MM Fd-Inst (GVIXX)	
Balanced G&I (53/45/2) *			<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 (VBTLX)	
Money Market	2%	Allspring Government MM Fd-Inst (GVIXX)	
Balanced Growth (70/28/2) *			<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 (VBTLX)	
Money Market	2%	Allspring Government MM Fd-Inst (GVIXX)	
Growth (86/12/2) *			<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 (VBTLX)	
Money Market	2%	Allspring Government MM Fd-Inst (GVIXX)	
Israeli ETF (98/2) **			<input type="text"/> %
Israeli Equities	98%	BlackRock iShares MSCI Israel ETF (EIS)	
Cash	2%	Wells Fargo Bank Deposit Sweep	
* Equity/Fixed Income/Money Market			Total 100%
** Daily Model trades over \$25,000 may take longer to execute			

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 February 2023. 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.