



## 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, growth of capital or combination of both?

Maximum  
Growth

Growth

Growth &  
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: \_\_\_\_\_