



Investment Selection Form

Fund Name _____

Signature (s) _____

Date _____

Recommend your preferred investment option by listing a percentage next to the option(s) you choose. You may recommend a change at any time in writing.

ENDOWMENT OPTION

____ % **Mercer Endowment Portfolio**

Mercer Investments LLC advises JFOM and has invested the portfolio 60% in stocks and 40% in bonds within the United States and internationally. The portfolio uses a combination of index and actively managed Vanguard mutual funds to achieve the 60/40 mix. The objective of the portfolio is to provide long-term growth while also supporting near-term spending needs. Thus, equities are used to provide greater long-term growth potential while bonds are used to protect the portfolio in the short-term from the higher expected volatility of equities. Expense Ratio .29%

VANGUARD OPTIONS

____ % **Vanguard Short Term Bond Index**

(VBIRX): 100% Bonds; Expense Ratio .06%

____ % **Vanguard Life Strategy Income (VASIX):**

20% Stocks/80% Bonds; Expense Ratio .11%

____ % **Vanguard Life Strategy Conservative**

Growth (VSCGX): 40% Stocks/60% Bonds, Expense Ratio .12%

____ % **Vanguard Life Strategy Moderate**

Growth (VSMGX): 60% Stocks/40% Bonds, Expense Ratio .13%

____ % **Vanguard Life Strategy Growth**

(VASGX): 80% Stocks/20% Bonds; Expense Ratio .14%

____ % **Vanguard Total Stock Market Index**

(VTSAX): 100% US Stocks; Expense Ratio .04%

OTHER OPTIONS

____ % **JLens**

The JLens' Jewish Advocacy Strategy is a values-based S&P 500 Index strategy that aligns with Jewish values and advocates for communal concerns in the Socially Responsible Investing and Corporate Social Responsibility movements. The Jewish Advocacy Strategy portfolio consists of approximately 300 companies selected based on a scoring system for 6 Jewish values. Expense Ratio .50%

____ % **Israel Stock Fund (ISRA)**
(Maximum 20%)

The Israel Stock Fund is an investment in an Exchange-Traded Fund (ETF) that seeks to replicate the return of the BlueStar Israel Global Index. The Index ETF offers an efficient, diversified exposure to a range of Israeli companies, both large and small.* Expense Ratio .59%

____ % **Cash**

Principal Protection - Funds invested in 100% money market funds, CDs, US Treasuries, and/or cash equivalents in government insured accounts at local and national banks.

*Like all stock investments, it is subject to elevated risks, including those associated with foreign securities (in particular political and governmental instability risks surrounding Israel which can generate greater price volatility). All persons choosing this option should consider this investment to be one part of an overall allocation and should read the Fact Sheet provided from Van Eck Securities.