



INDIVIDUALLY MANAGED FUNDS

INVESTMENT AUTHORIZATION FORM

DONOR ADVISOR RECOMMENDATION

I/We request that the Bradley Impact Fund create an Individually Managed Fund in a separate account at _____ (name of financial institution) managed by _____ (name of Investment Advisor) for the assets in the Personal Giving Account (the "Account").

I/We acknowledge receipt of and agreement with this Investment Recommendation Form and the Individually Managed Funds Program Description, which may be amended by the Bradley Impact Fund from time to time.

 Signature Date Signature Date

 Print Donor Name Print Donor Name

INVESTMENT ADVISOR ACKNOWLEDGEMENT

The undersigned Investment Advisor acknowledges receipt of and agreement with this Investment Recommendation Form and the Individually Managed Funds Program Description, which may be amended by the Bradley Impact Fund from time to time.

 Signature Date Print Investment Advisor Name

 Email Phone

ACCOUNT INFORMATION

Financial institution's address _____
 Operations Contact (due diligence purposes, to request wire transfers, questions on activity, etc.)

 Name

 Email Phone