INTER PARISH LOAN FUND
PARISH & SCHOOL INVESTMENT PROGRAM

☐ New Account ☐ Change to Account
☐ New Deposit ☐ Withdrawal ☐ Rebalance

Parish/School _____ Date: _____
Mailing Address: _____
_____
Name/Purpose of Acct: _____
Contact Person: _____ Phone: _____

Option A - Up to 100% in any option. **Option B - Maximum combined equity limited to 70%.**
The allocation increment is 5%.

Investment Options		**Choice**	**Selection**
		Apply to:	☐ Entire Account ☐ New Deposits
☐ **Option A - Up to 100% in any option**			
BALANCED PORTFOLIO	Portfolio Allocation		
†Christian Brothers Investment Fund (*not publicly traded*)	60 stock 40 bonds	0%-100%	_____
†PNC Balanced Portfolio (*not publicly traded*)	65 stock 35 bonds	0%-100%	_____
T. Rowe Price Balanced Fund (RPBAX)	65 stock 35 bonds	0%-100%	_____
Vanguard Group Balanced Index Fund (VBINX)	60 stock 40 bonds	0%-100%	_____
		Total	100%
☐ **Option B - Maximum combined equity limited to 70%**			
MONEY MARKET			
Federated Government Money Market Fund (GOIXX)		0%-100%	_____
BONDS			
Blackrock Low Duration Bond Instl (BFMSX)		0%-100%	_____
Blackrock Total Return Instl (MAHQX)		0%-100%	_____
Blackrock High Yield Bond Fund (BHYIX)		0%-100%	_____
Vanguard Total Bond Market ETF (BND)		0%-100%	_____
†Knights of Columbus Limited Duration Bond (KCLIX)		0%-100%	_____
†Knights of Columbus Core Bond Fund (KCCIX)		0%-100%	_____
HYBRID			_____
T. Rowe Price Spectrum Income Fund (RPSIX)		0%-100%	_____
(fund can invest up to 25% in stocks)			
STOCKS - Large Caps			
Vanguard Value ETF (VTV)		0%-70%	_____
T. Rowe Price Blue Chip Growth Fund (TRBCX)		0%-70%	_____
Vanguard Total Stock Market Index ETF (VTI)		0%-70%	_____
†Knights of Columbus Large Cap Value Fund (KCVIX)		0%-70%	_____
†Knights of Columbus Large Cap Growth Fund (KCGIX)		0%-70%	_____
STOCKS - Other Strategies			
Max exposure in any of the "Other Equity" 15% for International Equity, MidCap; 10% REIT, Small Cap			
iShares MSCI EAFE ETF (EFA)		0%-15%	
Federated International Equity Fund R-6 (PEIRX)		0%-15%	_____
†Knights of Columbus International Equity Fund (KCIIX)		0%-15%	_____
iShares Core S&P Small Cap ETF (IJR)		0%-10%	_____
†Knights of Columbus Small Cap Equity Fund (KCSIX)		0%-10%	_____
Vanguard REIT Index (VNQ)		0%-10%	_____
Principal MidCap Fund R-6 (PMAQX)		0%-15%	_____
STOCKS Sub Total		70%	_____
		Total	100%

Authorized by: _____ Title: _____

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