

Client first name

Client last name

FLEXIBLE PLAN
INVESTMENTS

Donor Advised Funds allocation selections

Turnkey	Risk profile (if applicable)	Allocation %
QFC Fusion 2.0		
QFC Fusion Prime 2.0		
QFC Multi-Strategy Core		
QFC Multi-Strategy Explore: Equity Trends		
QFC Multi-Strategy Explore: Low Correlation		
QFC Multi-Strategy Explore: Low Volatility		
QFC Multi-Strategy Explore: Special Equity		
Core	Risk profile (if applicable)	Allocation %
QFC Dynamic Fund Profiles		
QFC Evolution Plus		
QFC Lifetime Evolution		
QFC Market Leaders		
All-Terrain	Risk profile (if applicable)	Allocation %
QFC All-Terrain		
Domestic Tactical Equity		Allocation %
QFC Classic		
QFC Diversified Tactical Equity		
QFC Low Volatility Rising Dividends		
QFC Political Seasonality Index		
QFC Self-adjusting Trend Following		
QFC Systematic Advantage		
Fixed Income		Allocation %
QFC Managed Income		
Tactical Fixed Income		Allocation %
QFC Fixed Income Tactical		
QFC Government Income Tactical		
Alternatives		Allocation %
QFC Liquid Alternatives		
QFC S&P Pattern Recognition		
QFC Select Alternatives		
QFC TVA Gold		
Sectors		Allocation %
QFC Market Leaders Sector Growth Ultra		
Principled Investing	Risk profile (if applicable)	Allocation %
QFC Classic Better World		
QFC Classic Faith Focused		
QFC Common Ground		
QFC Faith Focused		
QFC For a Better World		

100%

column total

Once complete, please submit this allocation sheet to newmoney@flexibleplan.com along with your [suitability questionnaire](#) and [Donor Application](#). Our New Accounts team will work directly with National Charitable Endowment to establish the Donor Advised Fund account.