



## Change in Investment Option Election

Innovia Foundation fund holders can elect, on an annual basis, to transfer funds to another investment option offered by Innovia.

Currently, Innovia Foundation offers the following investment options:

- **Consolidated Investment Pool**
- **Environmental, Social, Governance (ESG) Pool**

To be eligible to request a transfer to a different investment option, the following criteria must be met:

- A fund must have a minimum \$10,000 balance
- Each investment option requires a \$10,000 minimum balance.
- A fund must have been invested in its original investment option for a minimum of 12 months before the fund is eligible to request a transfer.

Additional considerations before requesting a transfer to a different investment option are as follows:

- If, by electing to make a transfer, the fund balance is such that a \$10,000 minimum balance cannot be maintained in an investment option, the entire fund balance may be transferred.
- A fund holder may elect to transfer the entire fund balance from one investment option to another.

Investment returns and asset allocations for each pool can be found on our website at [www.innovia.org](http://www.innovia.org). To view how a fund is currently invested, please refer to the Donor Dashboard on DonorView or the monthly fund statements also available on DonorView.

To request a change in investment option, please complete and return the form on page 2 either by mail or e-mail attachment. An election to change investment options must be returned to the Foundation by **August 16, 2021** and will be effective **September 15, 2021**.

Any request to change investment options will remain in effect until September 14, 2022.

If you have any questions regarding the process or how to complete the form, please contact Lauren Autrey at (509) 624-2606 or [lautrey@innovia.org](mailto:lautrey@innovia.org)

# Innovia Foundation

## Investment Option Election Form



Fund Name \_\_\_\_\_

Transfer election:

- Transfer \$ \_\_\_\_\_ **from** the Consolidated Investment Pool **to** the Environmental, Social, Governance (ESG) Pool
- Transfer \$ \_\_\_\_\_ **from** the Environmental, Social, Governance (ESG) Pool **to** the Consolidated Investment Pool.
- Transfer the entire fund balance **from** the Consolidated Investment Pool **to** the Environmental, Social, Governance (ESG) Pool
- Transfer the entire fund balance **from** the Environmental, Social, Governance (ESG) Pool **to** the Consolidated Investment Pool.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Title (if applicable)

\_\_\_\_\_  
Date

Please return this form, confirming your election, no later than August 16, 2021.

**By e-mail:**

lautrey@innovia.org

**By mail:**

Innovia Foundation  
Attn: Lauren Autrey, Chief Financial Officer  
421 West Riverside, Suite 606  
Spokane, WA 99201

Internal Use Only: Account ID \_\_\_\_\_ Tran ID \_\_\_\_\_