



ASSET REALLOCATION

To change asset allocation in a single account, please provide the following information.
Requests received by noon on any business day are processed on the next business day.

1. UCF Account

ACCOUNT NAME _____
NUMBER _____

2. Desired Allocation

Fixed Income _____ %
Domestic Core Equity _____ %
Beyond Fossil Fuels _____ %
Small Cap Equity _____ %
International Equity _____ %
Cash & Equivalent _____ %
Total Equity _____ %
Conservative Balanced _____ %
Moderate Balanced _____ %
Aggressive Balanced _____ %
Beyond Fossil Fuels Balanced _____ %
TOTAL _____ %

Please ensure your allocation equals 100%

4. Reallocation Authorization

NAME _____
DAY PHONE _____
EMAIL _____
SIGNATURE _____