



MINOR'S PER CAPITA TRUST
INVESTMENT CHANGE FORM
August 2022 \* Economic Extension

Tulalip Enrollment
360-716-4300

Minor's Full Name: \_\_\_\_\_ Roll#: \_\_\_\_\_
Date of Birth: \_\_\_\_\_

Federal law requires the Tulalip Tribes to protect the interests of minors and legal incompetents who receive payments from gaming revenues and 18 tax free deferred program. The Tulalip Tribes has established trust accounts for all minors/legal incompetents who receive payments.

There are two (2) investment options. You must elect one of the two. You may change your election once per year normally in February. Due to the instability and global economy the Tulalip Tribes is offering an open period for change until August 19th, 2022. The investment options are listed below.

If you would like to make a change you have until August 19th, 2022 to fill out this form and it must be returned to the Enrollment Office by August 19th at 4:30PM. Mailing Address: Enrollment Office, 6406 Marine Dr, Tulalip, WA 98271, Fax 360-716-0209, or attach to E-mail at mriveira@tulaliptribes-nsn.gov

\*\*NOTE\*\* Only fill out this form if you want to make changes or if you want to selection pool# 1. Pool #2 if you never selected an option you are in pool #2 that is the default option.

Please make your election by checking the box of your choice:

A. Pool #1 - Conservative Investment:

The Conservative Investment Pool option is an investment option with the primary objective of preserving capital (deposited per capita funds), while providing a competitive rate of return that is intended to keep up with inflation plus a little additional return.

[ ] Please deposit my child/ward's per capita funds in Pool #1, Conservative Investment.

B. Pool #2 - Balanced Portfolio:

The Balanced Portfolio option is an age based investment strategy with diversified portfolios (a mix of stocks and bonds) becoming increasingly more conservative as the age group nears the distribution age of 18, subject to Trust provisions. There will be three age groups:

Balanced #1 (Ages 15 and Older) (10% Stocks, 90% Bonds & Money Market)

Balanced #2 (Ages 10 - 14) (50% Stocks, 50% Bonds & Money Market)

Balanced #3 (Ages 0 - 9) (65% Stocks, 35% Bonds & Money Market)

If you elect Pool #2, the age of your child will determine which of the three portfolios their funds will be invested in. (Example: an 11 year old will be in the #2 Age Group, until the child reaches 15, when it will automatically shift to the # 1 Age group).

[ ] Please deposit my child/ward's per capita funds in Pool #2, Balanced Portfolio.

LEGAL Custodial Parent or Guardian must sign:

Mother:

Print Name: \_\_\_\_\_ Sign Name: \_\_\_\_\_ Date: \_\_\_\_\_
(Authorized Parent or Guardian)

Father:

Print Name: \_\_\_\_\_ Sign Name: \_\_\_\_\_ Date: \_\_\_\_\_
(Authorized Parent or Guardian)

Self (if over 18) or Guardian:

Print Name: \_\_\_\_\_ Sign Name: \_\_\_\_\_ Date: \_\_\_\_\_
(Authorized Parent or Guardian)

\*\*\*\*\*OFFICAL USE ONLY\*\*\*\*\*

Received By: \_\_\_\_\_ Date: \_\_\_\_\_

Entered: \_\_\_\_\_ Date: \_\_\_\_\_

Uploaded: \_\_\_\_\_ Date: \_\_\_\_\_