MINOR'S PER CAPITA TRUST
INVESTMENT ELECTION FORM

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 per capita payments from gaming revenues. The Tulalip Tribes has established trust accounts for all minors/legal incompetents who receive per capita payments.

There are two (2) investment options. You must elect one of the two. You may change your election once per year, during the enrollment period in February or new accounts. The investment options are listed below.

In order to make a change in the year of 2021 to the investment option this form must be returned to the Enrollment Office by February 28, 2021. Mailing Address: Enrollment Office, 6406 Marine Dr, Tulalip, WA 98271, Fax 360-716-0209, or Scan/E-mail rtopaum@tulaliptribes-nsn.gov

NOTEOnly fill out this form if you want to make changes or if you want to selection pool # 1. **Pool #2 is the default option if you do not respond your investment options will be Pool #2.**

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.**

Default - 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)

Guardian:
Print Name: _____ Sign Name: _____ Date:_____
(Authorized Parent or Guardian)

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

Received By:_____ Date:_____

Entered:_____ Date:_____

Uploaded:_____ Date:_____