Tulalip Enrollment
360-716-4300

MINOR'S PER CAPITA TRUST
INVESTMENT ELECTION FORM
New Enrollee of the Tulalip Tribes of Washington 2011

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 January or new accounts. The investment options are listed below.

In order to make a change in the year of 2010 to the investment option this form must be returned to the Enrollment Office with in 10 working days. Mailing Address: Enrollment Office, 6406 Marine Dr. Tulalip, WA 98271, Fax 360-716-0209, or Scan/E-mail rcarter@tulaliptribes-nsn.gov

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.**

If you do not make an election or return a completed form by the due date, your child/wards per capita funds will be placed in the Conservative Investment Pool #1

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:_____
Faxed 425-745-5017 Dennis Maher:_____ Date:_____