



INVESTMENT APPLICATION

Account Name: _____
 Account No.: _____
 Fixed Rate Investment: Interest Rate _____
 Beginning Date _____
 Maturity Date _____

TMF USE ONLY

Organization Name/Account Designation*	Tax I. D. Number
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Contact Person	Phone Number	Fax	E-mail Address
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STATEMENT INFORMATION
 (Please select one option) **monthly**, **quarterly**, **semi-annually**, or **annually**

_____ Attention _____

_____ Street _____ City _____ State _____ Zip _____
 (If more than one statement is required, please attach additional page)

ASSET ALLOCATION

Fixed Rate Investment – Methodist Loan Fund

Amount \$ _____

Term 1 year _____ 2 years _____ 3 years _____ 4 years _____ 5 years _____

AUTHORIZED SIGNERS *(Assign 2 or more; Printed Name)*

RESTRICTIONS *(if any)*

DISTRIBUTION OF INCOME
 (Please select one option) **on request (re-invest)**, **monthly**, **quarterly**, **semi-annually**, or **annually**

FIXED RATE INVESTMENT TERMS

A fixed rate investment account has a designated maturity date. Principal may not be added to the account after the initial investment is made and the account is opened. Principal may not be withdrawn from this account before the maturity date without the consent of Texas Methodist Foundation (“TMF”), and a penalty will be charged for such early withdrawal. The penalty for an account with an original maturity date of a year or more is four (4) months interest on the amount withdrawn.

Upon maturity, this account shall be automatically converted to a variable rate investment account unless the funds are withdrawn or another fixed rate investment opportunity is offered to and specifically chosen by the Investor.

MAKING AN INVESTMENT

Make checks payable to: TMF , Attn: Sara Beltran, 11709 Boulder Lane, Suite 100, Austin, Texas 78726

AUTHORIZATION

Please accept our Investment for management by TMF in accordance with the Master Investment Management Agreement with TMF:

By: _____
 Printed Name: _____
 Title: _____
 Date: _____

By: _____
 Printed Name: _____
 Title: _____
 Date: _____