



Account Name:  
Account No.:

TMF USE ONLY

## INVESTMENT APPLICATION

<b>Organization Name/Account Designation*</b>		<b>Tax I. D. Number</b>	
<b>Contact Person</b>	<b>Phone Number</b>	<b>E-mail Address</b>	
<b>STATEMENT INFORMATION</b>			
(Please select one option) <input type="checkbox"/> monthly <input type="checkbox"/> quarterly <input type="checkbox"/> semi-annually or <input type="checkbox"/> annually			
_____ Street	_____ City	_____ State	_____ Zip
<b>ASSET ALLOCATION</b>			
_____ TMF Impact Certificate – Variable      _____ TMF Impact Certificate – Fixed rate 1 yr __ 2 yr __ 3 yr __ 4 yr __ 5 yr __			
_____ TMF Balanced Portfolio      _____ US Equity      _____ International Equity			
_____ Fixed Income Fund      _____ Inflation Protection Fund      _____ Multiple Asset Fund			
<b>AUTHORIZED SIGNERS</b> <i>(Assign 2 or more; Names, phone and email for each)</i>			
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
<b>RESTRICTIONS</b> <i>(if any)</i>			
<b>DISTRIBUTION OF INCOME</b>			
(Please select one option) <input type="checkbox"/> on request (re-invest) <input type="checkbox"/> monthly <input type="checkbox"/> quarterly <input type="checkbox"/> semi-annually or <input type="checkbox"/> annually			
<b>FIXED RATE INVESTMENT TERMS</b>			
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 Principal may not be withdrawn from this account before the maturity date without the consent of Texas Methodist Foundation (“TMF”), and a penalty will be charged for such early withdrawal.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for an account with an original maturity date of a year or more is four (4) months interest on the amount of principal withdrawn.			
Upon maturity, this account shall be automatically converted to a variable rate investment account unless the funds are withdrawn or another fixed rate investment opportunity is offered to and specifically chosen by the Investor.			

### 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: \_\_\_\_\_

**Mail check and form to: TMF, Attn: Investor Services, 11709 Boulder Lane, Suite 100, Austin TX 78726-1808 Or email form to - [sbeltran@texasmethodistfoundation.org](mailto:sbeltran@texasmethodistfoundation.org) or [rforrest@texasmethodist.org](mailto:rforrest@texasmethodist.org)**

\*If your organization is not a church, please attach a copy of your organization's IRS Exemption Letter.