



<b>Account Name:</b> <b>Account No.:</b>	<b>TMF USE ONLY</b>
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## 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  <hr/> <div style="display: flex; justify-content: space-between;"> <span>Street</span> <span>City</span> <span>State</span> <span>Zip</span> </div>			
<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 Principal may not be withdrawn from this account before the maturity date without the consent of Texas Methodist Foundation (“TMF”), and a penalty will be charged for such early withdrawal.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for an account with an original maturity date of a year or more is four (4) months interest on the amount of principal withdrawn.  Upon maturity, this account shall be automatically converted to a variable rate investment account unless the funds are withdrawn or another fixed rate investment opportunity is offered to and specifically chosen by the Investor.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: _____	By: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Date: _____	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@texasmethodistfoundation.org](mailto:rforrest@texasmethodistfoundation.org)**

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