



Account Name: Account No.:	TMF USE ONLY
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INVESTMENT APPLICATION

Organization Name/Account Designation*		Tax I. D. Number																			
Contact Person	Phone Number	E-mail Address																			
STATEMENT INFORMATION (Please select one option) <table style="width: 100%; text-align: center; margin-top: 5px;"> <tr> <td>monthly</td> <td>quarterly</td> <td>semi-annually or</td> <td>annually</td> </tr> </table> <hr/> <table style="width: 100%;"> <tr> <td style="width: 33%;">Street</td> <td style="width: 33%;">City</td> <td style="width: 17%;">State</td> <td style="width: 17%;">Zip</td> </tr> </table>				monthly	quarterly	semi-annually or	annually	Street	City	State	Zip										
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ASSET ALLOCATION <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">TMF Impact Note – Variable</td> <td style="width: 17%;">TMF Impact Note – Fixed rate 1 yr</td> <td style="width: 17%;">2 yr</td> <td style="width: 17%;">3 yr</td> <td style="width: 17%;">4 yr</td> <td style="width: 17%;">5 yr</td> </tr> <tr> <td>TMF Balanced Portfolio</td> <td colspan="2">Wespath US Equity</td> <td colspan="3">Wespath International Equity</td> </tr> <tr> <td>Wespath Fixed Income Fund</td> <td colspan="2">Wespath Inflation Protection Fund</td> <td colspan="3">Wespath Multiple Asset Fund</td> </tr> </table>				TMF Impact Note – Variable	TMF Impact Note – Fixed rate 1 yr	2 yr	3 yr	4 yr	5 yr	TMF Balanced Portfolio	Wespath US Equity		Wespath International Equity			Wespath Fixed Income Fund	Wespath Inflation Protection Fund		Wespath Multiple Asset Fund		
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TMF Balanced Portfolio	Wespath US Equity		Wespath International Equity																		
Wespath Fixed Income Fund	Wespath Inflation Protection Fund		Wespath Multiple Asset Fund																		
AUTHORIZED SIGNERS <i>(Assign 2 or more; Names, phone and email for each)</i> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; border-bottom: 1px solid black;"> </td> <td style="width: 25%; border-bottom: 1px solid black;"> </td> <td style="width: 25%; border-bottom: 1px solid black;"> </td> <td style="width: 25%; border-bottom: 1px solid black;"> </td> </tr> <tr> <td style="border-bottom: 1px solid black;"> </td> <td style="border-bottom: 1px solid black;"> </td> <td style="border-bottom: 1px solid black;"> </td> <td style="border-bottom: 1px solid black;"> </td> </tr> <tr> <td style="border-bottom: 1px solid black;"> </td> <td style="border-bottom: 1px solid black;"> </td> <td style="border-bottom: 1px solid black;"> </td> <td style="border-bottom: 1px solid black;"> </td> </tr> </table>																					
RESTRICTIONS <i>(if any)</i>																					
DISTRIBUTION OF INCOME (Please select one option) <table style="width: 100%; text-align: center; margin-top: 5px;"> <tr> <td>on request (re-invest)</td> <td>monthly</td> <td>quarterly</td> <td>semi-annually or</td> <td>annually</td> </tr> </table>				on request (re-invest)	monthly	quarterly	semi-annually or	annually													
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FIXED RATE INVESTMENT TERMS <p>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.</p> <p>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.</p>																					

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 Relations, 11709 Boulder Lane, Suite 100, Austin TX 78726-1808
Or email form to - sbeltran@tmf-fdn.org or rforrest@tmf-fdn.org

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