



**APPLICATION**  
TO ESTABLISH AN  
**INVESTMENT ACCOUNT**  
WITH THE  
**DAKOTAS UNITED  
METHODIST  
FOUNDATION**

The \_\_\_\_\_ of the  
(Name of Board or Committee)

\_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
(Church or Agency) (City) (State)

has reviewed and accepted the terms stated in the **Policy Regarding Account Service Fees** with the Dakotas United Methodist Foundation.

Approval has been given to transfer to the Dakotas United Methodist Foundation for deposit an initial amount of \$ \_\_\_\_\_. This transfer is to be by authorized persons in the form of a check or through special arrangements in the case of stocks or other assets. This will establish an Investment Account with the Foundation.

The Board policies regarding investments and accounts are available upon request.

The following person/s are hereby authorized to make such deposits and withdrawals in the future on behalf of the \_\_\_\_\_.

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_

**We would like our investment in the following account:**

\_\_\_\_\_ **Growth Fund (up to 70% equities / 30% fixed income)**

\_\_\_\_\_ **Balanced Fund (approximately 50% equities / 50% fixed income)**

\_\_\_\_\_ **Fixed Income Fund (through Wespath Investments)**

Dated this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

Board/Agency: \_\_\_\_\_

Signed: \_\_\_\_\_ Title: \_\_\_\_\_

The Dakotas United Methodist Foundation follows the Social Investing Guidelines of the United Methodist Church

If there is additional information that should be included for the management of this Investment Account, please included it here. This may include how the funds are to be distributed by the church/ministry.

Signed: \_\_\_\_\_

Date: \_\_\_\_\_