



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.

