



NEW ACCOUNT APPLICATION

Establishing an account with United Church Funds involves a simple, three-step process. Just prepare the documents listed below, and send your application package to us at the address provided below. If you have any questions, call us toll-free at 877-806-4989.

1. Prepare a resolution that documents your organization's authorization of both the investment account and the individuals authorized to manage the account. ***The resolution must be signed and notarized,*** with a copy sent to United Church Funds.

Sample language

Be it resolved that _____ (NAME OF CHURCH OR ORGANIZATION) _____ hereby authorizes its _____ (TITLE OF FIRST OFFICER, NAME) _____ and its _____ (TITLE OF SECOND OFFICER, NAME) _____ to establish one or more investment accounts with United Church Funds, in any of its Common Investment Funds presently in existence or established at a future date. Any future transactions related to the church's investments with United Church Funds. may be authorized by either the then-current _____ (TITLE OF FIRST OFFICER) _____ and its _____ (TITLE OF SECOND OFFICER) _____ in whatever form required by United Church Funds.

If the bylaws of your organization grant authority to certain officers or committees to make investments on behalf of the organization, a copy of the bylaws may be provided in place of the resolution. If the bylaws give authority to certain individuals, a list of the organization's authorized officers and/or committees of the organizations — certified by the church secretary or clerk — should accompany the copy of the bylaws.

2. Complete the attached Account Application, and ensure that the application is signed by the individuals named in the resolution or bylaws that accompany the application.
3. Complete the Electronic Funds Transfer Authorization and attach a voided check or deposit slip from the bank account to be associated with your United Church Funds investment account.

United Church Funds
475 Riverside Dr, Suite 1020
New York, NY 10115

QUESTIONS? Call us toll-free at **877-806-4989** or visit us online at **unitedchurchfunds.org**



1. ACCOUNT APPLICATION

Note: All correspondence will be sent to the officer and address named below, unless special instructions are provided.

Legal Name of Organization (print) _____

Contact Name _____

Address _____ City _____ State _____ Zip _____

Telephone Number _____ State of Incorporation or Organization _____

UCC Relationship: Church ____ Association ____ Conference ____ National Ministry ____ CHSM Organization ____ Other (specify) _____

Total initial investment \$ _____

Check Attached

Bank transfer from _____

Cash & Equivalent
 Domestic Core Equity
 Small Cap Equity
 International Equity
 Fixed - Income
 Total Equity
 Conservative Balanced
 Moderate Balanced
 Aggressive Balanced

INVESTMENT ALLOCATION

Name of Account*	\$ Amount	% Allocated to each Fund**								Income	
										Payout	Reinvest
										<input type="checkbox"/>	<input type="checkbox"/>
										<input type="checkbox"/>	<input type="checkbox"/>
										<input type="checkbox"/>	<input type="checkbox"/>
										<input type="checkbox"/>	<input type="checkbox"/>
										<input type="checkbox"/>	<input type="checkbox"/>

Total \$ _____

* If more than five accounts are being established, please continue listing additional accounts on a separate sheet.

** The percentages indicated will be used for all future additions to and withdrawals from each account unless other instructions are provided.

Signature _____ Date _____

Name _____ Title _____

Special Instructions _____

2. ELECTRONIC FUNDS TRANSFER AUTHORIZATION

Please deposit payments by electronic funds transfer in the following bank account. Be sure to attach a voided check.

Bank Name _____ Bank Routing Number _____

Organization's Bank Account Number _____ Checking Savings

Bank Address _____

Direct Deposit Authorization

_____ authorizes United Church Funds to initiate credit entries and necessary adjustments to the bank account named above. Please send confirmation of deposits to the email addresses below.

Signature _____ Date _____

Signature _____ Date _____

Name _____

Name _____

Title _____

Title _____

Email _____

Email _____

(ATTACH VOIDED CHECK HERE)