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ALTERNATIVES INVESTMENT  
PROGRAM

## ACCOUNT SET UP PROCESS

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Establishing an account with United Church Funds requires the following elements. Please prepare the documents listed below and send your application package to the following address —

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

- 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 lieu 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 New 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.

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

## A NEW 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 \_\_\_\_ CHHSM Organization \_\_\_\_ Other (specify) \_\_\_\_\_

Total initial investment \$ \_\_\_\_\_  Check attached  Bank transfer from \_\_\_\_\_

### ALTERNATIVES INVESTMENT ALLOCATION

Name of Account*	\$ Amount	Alternatives Fund % Allocated to each Fund**	Alternatives Balanced Fund % Allocated to each Fund**
1.			
2.			
3.			
4.			
5.			

Total \$ \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

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

Special Instructions —

## B ELECTRONIC FUNDS TRANSFER AUTHORIZATION

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 \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name \_\_\_\_\_

Title \_\_\_\_\_

Email \_\_\_\_\_

(ATTACH VOIDED CHECK OR DEPOSIT SLIP HERE)



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