



## ALLOCATION OF INVESTMENTS FORM

To allocate assets within a new UCF account, or to re-allocate assets within an existing account, please provide the following information. Transactions are processed in 3-5 business days. Send completed form to UCF's Client Services team at [info@ucfunds.org](mailto:info@ucfunds.org).

### 1. PROVIDE UCF ACCOUNT INFORMATION (all required fields):

Date of Request: \_\_\_\_\_ Account Number(s): \_\_\_\_\_

Account Name(s): \_\_\_\_\_

### 2. SELECT ONE OF THE FOLLOWING OPTIONS:

- Allocation of new UCF Account                       Re-allocation of existing UCF Account  
 If this is a new investment account, check here if you wish to establish Dollar Cost Average strategy. \_\_\_

If Dollar Cost Average strategy is selected, include the amount of months here: \_\_\_\_\_. Note that assets will be held in the UCF Cash & Equivalent Fund, with equal installments allocated monthly to the investment funds noted below.

### 3. SELECT THE UCF INVESTMENT FUND(S) TO WHICH YOU WISH TO ALLOCATE / RE-ALLOCATE ASSETS:

	Dollar Amount (\$)	OR	Percentage (%)
UCF Balanced Fund	_____		_____
UCF Beyond Fossil Fuels Balanced Fund	_____		_____
UCF Alternatives Balanced Fund *	_____		_____
UCF Total Equity Fund	_____		_____
UCF Fixed Income Fund	_____		_____
UCF Domestic Core Equity Fund	_____		_____
UCF Beyond Fossil Fuels Equity Fund	_____		_____
UCF International Equity Fund	_____		_____
UCF Small Cap Equity Fund	_____		_____
UCF Alternatives Fund * *	_____		_____
UCF Cash & Equivalents Fund	_____		_____
<b>TOTALS</b>	_____		_____

\* UCF Alternatives Balanced Fund offers monthly liquidity and will be processed accordingly.

\*\* UCF Alternatives Fund offers quarterly liquidity and will be processed accordingly.

**4. AUTHORIZATION INFORMATION**

Authorized Officer Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Organization Name: \_\_\_\_\_ City and State: \_\_\_\_\_

Officer Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Please contact United Church Funds with questions by email at [info@ucfunds.org](mailto:info@ucfunds.org) or by phone at 877-806-4989.  
Thank you for the opportunity to be of service to your organization!