



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.

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 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 ALLOCATION/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	_____	_____
TOTALS	_____	_____

* 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 or by phone at 877-806-4989. Thank you for the opportunity to be of service to your organization!