

## NEW ACCOUNT APPLICATION FOR EXISTING CLIENTS

### SECTION 1: ORGANIZATION DETAILS

Name of Organization: \_\_\_\_\_

Existing UCF Account Number(s): \_\_\_\_\_

### SECTION 2: ESTABLISH ADDITIONAL INVESTMENT ACCOUNTS

Please indicate the name or title you would like to establish for each account you wish to open. Ex: Church Scholarship Account. (Note: This field should not reflect the investment fund allocation name)

Quarterly Income is either reinvested back into the fund or paid out to the bank account on file. To establish multiple reoccurring transaction(s), please complete the [Transaction Form](#).

**Unless otherwise specified, deposits will be initiated by ACH using the existing instructions on file.**

Account Name	Dollar Amount \$	Quarterly Income (Check One)		
		<input type="checkbox"/> Reinvest	or	<input type="checkbox"/> Paid Out
		<input type="checkbox"/> Reinvest	or	<input type="checkbox"/> Paid Out
		<input type="checkbox"/> Reinvest	or	<input type="checkbox"/> Paid Out
		<input type="checkbox"/> Reinvest	or	<input type="checkbox"/> Paid Out
		<input type="checkbox"/> Reinvest	or	<input type="checkbox"/> Paid Out
		<input type="checkbox"/> Reinvest	or	<input type="checkbox"/> Paid Out
		<input type="checkbox"/> Reinvest	or	<input type="checkbox"/> Paid Out
		<input type="checkbox"/> Reinvest	or	<input type="checkbox"/> Paid Out

For funding methods other than ACH, include one of the following forms:

- **Wire** – [click here](#) for Wiring Transfer Instructions
- **Stock Donation** – [click here](#) for the Stock Donation form
- **Internal transfer** – [click here](#) for the Transfer Among Accounts form

## SECTION 3: INVESTMENT ALLOCATION INSTRUCTIONS

This section provides UCF with your organization's initial investment allocation instructions.

Check all that apply:

☐ The allocation entered below will be applied to all accounts listed in Section 2

☐ Allocate each account differently. Complete this page for each account.  
\*Specify account name: \_\_\_\_\_

☐ Establish a Dollar Cost Average strategy. Specify the number of months: \_\_\_\_\_.

Note that assets will be held in the UCF Cash & Equivalent Fund, with equal installments allocated monthly to the investment funds noted below for Dollar Cost Average strategy.

**Select the UCF investment fund(s) to which you wish to 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. AUTHORIZED SIGNATURE

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

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