

APPLICATION FOR ADDITIONAL UCF ACCOUNTS

For Existing UCF Clients

Use this form to establish one or more additional UCF accounts for an Organization that already maintains an account with UCF.

This form provides account-opening, funding, investment allocation and quarterly income distribution instructions.

The Organization's participation in UCF's pooled investment funds remains governed by its Master Participation Agreement or other applicable account agreement with UCF.

Secure Submission

For your protection, forms containing banking information, account numbers, donor information or other sensitive information should be submitted through [UCF's secure upload page](#) whenever possible. Completed forms may also be submitted to UCF Client Services at info@ucfunds.org

1. ORGANIZATION DETAILS

Organization Name: _____

Existing UCF Account Name(s): _____

Existing UCF Account Number(s): _____

2. ESTABLISH ADDITIONAL INVESTMENT ACCOUNTS

Please indicate the name or title you would like to assign to each account you wish to establish (for example, Church Scholarship Fund or Memorial Endowment Fund).

Note: Account names should describe the purpose of the account and should not be the name of a UCF investment fund.

Quarterly income may be:

- Reinvested into the account; or
- Distributed to the organization's bank account on file with UCF.

Unless otherwise specified and accepted by UCF, funding for any additional account(s) will be processed via ACH using the organization's banking instructions currently on file with UCF.

If a new bank account is to be used for funding, a completed ACH Authorization Form must be submitted and approved before the account can be funded.

Account Name	Dollar Amount \$	Quarterly Income (Check One)		
		☐ Reinvest	or	☐ Paid Out
		☐ Reinvest	or	☐ Paid Out
		☐ Reinvest	or	☐ Paid Out
		☐ Reinvest	or	☐ Paid Out
		☐ Reinvest	or	☐ Paid Out
		☐ Reinvest	or	☐ Paid Out
		☐ Reinvest	or	☐ Paid Out
		☐ Reinvest	or	☐ Paid Out

For funding methods other than ACH, please include the applicable form below:

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

3. INVESTMENT ALLOCATION INSTRUCTIONS

This section provides UCF with your organization's initial investment allocation instructions. These instructions are for account-opening and processing purposes and may be based on estimated or anticipated funding amounts.

Contributions will be credited and invested only after assets have been received, accepted and processed by UCF. If the actual funding amount or timing differs from what was originally expected, UCF may temporarily hold the assets in the **UCF Cash & Equivalents Fund** or another liquidity option and may request confirmation or updated allocation instructions before investing the assets in the selected fund(s).

Check all that apply:

- ☐ The allocation entered below will be applied to all accounts listed in Section 2.
- ☐ Allocate each account differently. Complete this section separately for each account.

Account Name: _____

- ☐ Establish a Dollar Cost Averaging (DCA) Strategy.

Number of Months: _____

Note: For accounts utilizing a Dollar Cost Averaging strategy, assets will initially be invested in the UCF Cash & Equivalents Fund. Equal installments will then be allocated monthly to the investment fund(s) selected below over the specified averaging period. If contributions are received over time, UCF may adjust the DCA schedule accordingly or request updated instructions.

Investment Allocation

Please indicate either the Dollar Amount (\$) or Percentage (%) to be invested in each fund below. If percentages are provided, allocations must total 100%. If dollar amounts are provided, the total will be invested according to the amounts specified.

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

*** Alternatives Balanced Fund and Alternatives Fund offer nonstandard liquidity. Please contact UCF Staff for additional information.**

4. AUTHORIZATION

By signing below, the Authorized Officers certifies that they are authorized to provide the instructions set forth in this form on behalf of the Organization. The Authorized Officers further represents that all information provided is accurate and complete. UCF may rely upon these instructions and act on them in accordance with the Organization's Master Participation Agreement and any other applicable account agreement with UCF.

Authorized Officer Name: _____

Signature: _____ Date: _____

Authorized Officer Name: _____

Signature: _____ Date: _____