United Church Funds
Investing Together for a Sustainable World

Toll-free: 877-806-4989
Fax: 332-219-8758
Email: info@ucfunds.org

DOLLAR-COST AVERAGING (DCA) REQUEST FORM

Use this form to request that United Church Funds (UCF) dollar-cost averages a specified amount into one or more UCF investment funds over a series of monthly installments.

This form may be used when:

- The amount to be dollar-cost averaged is already held in the UCF Cash & Equivalents Fund.
- The Organization is making a new contribution to an existing UCF account and wishes to have all or a portion of that contribution held in the UCF Cash & Equivalents Fund before being invested over time.

Secure Submission

For your protection, forms containing banking information, account numbers, donor information or other sensitive data 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 INFORMATION

Organization Name: _____

UCF Account Name: _____

UCF Account Number: _____

2. DOLLAR-COST AVERAGING INSTRUCTIONS

Total Amount to be Dollar-Cost Averaged: $_____

Source of Funds (select one):

☐ Existing balance in UCF Cash & Equivalents Fund

☐ New contribution to an existing UCF account

Number of Monthly Installments: _____

Requested Start Month: _____

3. IMPORTANT INFORMATION

Unless otherwise approved by UCF, the amount designated for dollar-cost averaging will be held in the UCF Cash & Equivalents Fund and transferred in approximately equal monthly installments into the UCF investment fund(s) selected below.

UCF will process dollar-cost averaging instructions only after assets have been:

- Received and accepted by UCF;
- Matched to the appropriate account; and
- Accompanied by complete funding and allocation instructions.

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If the amount received differs from the expected amount, is received in multiple installments or if instructions are incomplete or unclear, UCF may request confirmation or updated instructions before processing.

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

4. TARGET ALLOCATION FOR MONTHLY INSTALLMENTS

Please indicate the percentage to be invested into each fund. Total allocations must equal 100%. UCF will apply these percentages to each monthly installment.

	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*	_____
Totals:	

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

5. CHANGES OR TERMINATION OF DCA INSTRUCTIONS

The Organization may request changes to or termination of these dollar-cost averaging instructions by providing written instructions acceptable to UCF. Changes may require additional review and will be effective only after received and processed by UCF.

6. AUTHORIZATION

By signing below, the Authorized Officer certifies that they are authorized to provide the instructions set forth in this form on behalf of the Organization. UCF may rely on this instruction in accordance with the Organization's Master Participation Agreement or other applicable account agreement with UCF.

Authorized Officer Name:_____

Signature: _____ Date: _____