



Account Name:
Account No.:

TMF USE ONLY

INVESTMENT APPLICATION

Organization Name/Account Designation*			Tax I. D. Number	
Contact Person		Phone Number	E-mail Address	
STATEMENT INFORMATION (Please select one option) ☐ monthly ☐ quarterly ☐ semi-annually or ☐ annually				
Street		City	State	Zip
ASSET ALLOCATION _____ TMF Impact Certificate – Variable _____ TMF Impact Certificate – Fixed rate __ 1 yr __ 2 yr __ 3 yr __ 4 yr __ 5 yr _____ TMF Balanced Fund _____ TMF US Equity Fund _____ TMF International Equity Fund _____ TMF Fixed Income Fund _____ TMF Inflation Protection Fund _____ TMF Multiple Asset Fund				
AUTHORIZED SIGNERS (Assign 2 or more; Names, phone and email for each) _____ _____ _____				
RESTRICTIONS (if any)				
DISTRIBUTION OF INCOME (Please select one option) ☐ on request (re-invest) ☐ monthly ☐ quarterly ☐ semi-annually or ☐ annually				
FIXED RATE INVESTMENT TERMS A fixed rate investment account has a designated maturity date. Principal may not be added to the account after the initial investment is made and the account is opened. Principal may not be withdrawn from this account before the maturity date without the consent of Texas Methodist Foundation (“TMF”), and a penalty will be charged for such early withdrawal. The penalty for an account with an original maturity date of a year or more is four (4) months interest on the amount of principal withdrawn. Upon maturity, this account shall be automatically converted to a variable rate investment account unless the funds are withdrawn or another fixed rate investment opportunity is offered to and specifically chosen by the Investor.				

AUTHORIZATION

Please accept our Investment for management by TMF in accordance with the Master Investment Management Agreement with TMF:

By: _____
Printed Name: _____
Title: _____
Date: _____

By: _____
Printed Name: _____
Title: _____
Date: _____

I have reviewed the Offering Circular prior to completing this application.

Mail form to: Texas Methodist Foundation, Attn: Investor Services, 11709 Boulder Lane, Suite 100, Austin, TX 78726

Or email form to: investorrelations@texasmethodistfoundation.org

Initial purchase can be made by mailing a check or through an electronic transfer of money from a bank account via ACH or wire

If you have any questions, please feel free to call or email Sara Beltran or Randi Forrest on our Investor Services team at 800-933-5502 or by email:

- Sara Beltran: sbeltran@texasmethodistfoundation.org
- Randi Forrest: rforrest@texasmethodistfoundation.org

*If your organization is not a church, please attach a copy of your organization's IRS Exemption Letter.