



Investment Agreement

This Agreement, made this ____ day of _____, 20____, by and between _____, (hereinafter called Investor), party of the first part, and THE UNITED METHODIST FOUNDATION OF THE GREATER NEW JERSEY ANNUAL CONFERENCE, a New Jersey non-stock, not-for-profit corporation (hereinafter called Foundation), party of the second part,

WITNESSETH:

1. The Investor, in consideration of the mutual promises herein contained by the Foundation does grant, bargain, sell, assign, transfer and set over unto the Foundation the funds set forth in the Account Information Form, attached hereto and a part hereof. Additional funds may be contributed to the account over time. Foundation is authorized to invest, reinvest and retain investments in accordance with the principles stated in the New Jersey Nonprofit Corporation Act, N.J.S.A. 15A:1-1 et seq.

Further, the Investor can make additions to the Foundation, its successors and assigns, shall invest these funds for the following uses and purposes:

Foundation shall invest and reinvest said money or the proceeds thereof in such securities and other property as Foundation in the exercise of its sole discretion shall deem proper. The Investor acknowledges that there are inherit risks in investing and the Foundation cannot assure that the Investor will obtain a net profit or avoid a loss when in

2. Either Investor or Foundation shall have the right at any time to terminate the Investment Agreement by delivering to the other party upon 30 days proper written notice. Following termination, payment to the Investor of the current market value of the investments shall be made within a reasonable time of proper notification of termination.

3. No officer or member of the Board of Trustees of the Foundation shall be liable or accountable for anything done or omitted by him in good faith in accordance with N.J.S.A. 15A:3-4 and pursuant to N.J.S.A. 15A:6-14.

4. Foundation shall submit quarterly to Investor a statement showing the market value at the end of each reporting period, together with current information regarding income received and current account transactions.

5. Foundation will charge Investor an annual fee of 0.39%, calculated and deducted quarterly from the account within 15 days after quarter end, on the average daily value of the account for the quarter to cover costs of administration.

6. This Agreement shall be governed by and interpreted under the laws of the State of New Jersey, as if made, executed and delivered by the parties of the State.



UNITED METHODIST
STEWARDSHIP FOUNDATION
OF GREATER NEW JERSEY

In witness whereof, the parties hereto have caused this agreement to be executed by their proper officers and their corporate or common seal affixed the day and year first above written.

(NAME OF INVESTOR)

ATTEST: _____

BY: _____

Designated Contact Person (Signature)

Pastor

Name: _____

Title: _____

(INVESTING FOUNDATION)

The United Methodist Foundation of the Greater New Jersey Annual Conference

ATTEST:

BY:

Executive Director,
The United Methodist Stewardship Foundation

Conference Treasurer &
Director of Administrative Services