



New Account Enrollment Form

Account Information

Corporate Name: _____

Registered Address: _____

Organization EIN Number: _____

Primary Contact Name, Title: _____

Contact Address: _____

Contact Phone Number: _____

Contact Email: _____

Bank Information for quarterly withdrawal

Bank Name: _____

Bank Address: _____

Name on Bank Account: _____

Account Number: _____

Routing Number: _____

Quarterly Withdrawals (of average quarterly balance)

___ No withdrawals

___ 0.25%

___ 0.50%

___ 1.00%

___ % (not to exceed 1.00%)

___ Fixed dollar amount of \$ _____



UNITED METHODIST
STEWARDSHIP FOUNDATION
OF GREATER NEW JERSEY

We have listed below the funds we propose transferring to the Foundation for our organization to be administered, invested, and reinvested under the Investment Agreement after the Foundation accepts our request.

We understand that any income on our investment in the Fund, less the annualized fee, will be reinvested. We further understand that we may change our quarterly withdrawal option with 30 days' notice.

We submit the following information in support of our request:

Corporate Name: _____

Designated Contact: _____

We plan to make our initial investment of \$_____ dollars specifically into the following fund checked off below:

Wespath Institutional Investments		Fidelity Investments	
MAF (Multiple Asset Fund)	[]	FIGXX Money Market	[]
STIF (Short Term Investment Fund)	[]		
USEF (U.S. Equity Fund)	[]		
USTPF (U.S. Treasury Inflation Protection)	[]		
FIF (Fixed Income Fund)	[]		

We plan to name this account the: _____.



UNITED METHODIST
STEWARDSHIP FOUNDATION
OF GREATER NEW JERSEY

This request is authorized by the action of the above named church or church organization in accordance with the attached resolution on this ____ day of _____, 20__.

By: _____
(Print Name and Title)

Signature

(Pastor's Name)

Signature

Accepted by The United Methodist Foundation of The Greater New Jersey Annual Conference

By: _____
(Print Name and Title)

Signature

Date: _____

A duly signed copy of this form will be returned to you upon receipt of your signed documents

(Revised 9/15/2022)