



Investment Fund Transfer Form

Account Information

Account Name and Number: _____

Registered Address: _____

We plan to move our current investment balance of \$_____ dollars or %____ 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)	[]		

Note: All transfers will be completed on a cut-off date of the first Tuesday after the receipt of this form. The final account balance moved *may* differ due to daily market fluctuations in between the time of receipt and processing.



UNITED METHODIST
STEWARDSHIP FOUNDATION
OF GREATER NEW JERSEY

This request is authorized by the action of the above named organization on this ____ day of _____,
20__.

By: _____
(Print Name and Title)

Signature

(Pastor's Name)

Signature

Accepted and processed 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 and balance
transfer completion**

(Revised 9/15/2022)