



**TEXAS METHODIST FOUNDATION  
APPLICATION FOR INVESTMENT –  
FOR INDIVIDUALS OTHER THAN IRAs**

Please complete the following application to purchase a Participation Interest. IF THE PURCHASE WILL BE MADE THROUGH AN IRA, PLEASE CONTACT THE FOUNDATION FOR THE APPROPRIATE SUBSCRIPTION MATERIALS. If choosing to set up the account as a joint investment the account will be styled as joint tenants with right of survivorship. (Please print)

Please circle – Salutation: Mr. Ms. Mrs. Rev. Dr.

Mr. Ms. Mrs. Rev. Dr.

OWNER \_\_\_\_\_ JOINT OWNER \_\_\_\_\_

BIRTH DATE \_\_\_\_\_ BIRTH DATE \_\_\_\_\_

OWNER SOCIAL SECURITY NO. \_\_\_\_\_ JOINT OWNER SOCIAL SECURITY NO \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_

TELEPHONE \_\_\_\_\_ FAX \_\_\_\_\_

EMAIL \_\_\_\_\_

CHURCH NAME (Optional) \_\_\_\_\_

The undersigned's personal net worth (total assets minus total liabilities) exceeds five (5) times the amount of investment in the Participation Interests. \_\_\_\_ YES \_\_\_\_ NO

AMOUNT OF INVESTMENT: \$ \_\_\_\_\_ (include check)

**The minimum investment is \$1,000.00. Please make your check payable to:  
Texas Methodist Foundation, 11709 Boulder Lane, Suite 100, Austin, Texas 78726-1808**

**TERM: (Please check one)**

- \_\_\_\_\_ Variable Rate
- \_\_\_\_\_ 12 Months – Fixed
- \_\_\_\_\_ 24 Months – Fixed
- \_\_\_\_\_ 36 Months – Fixed
- \_\_\_\_\_ 48 Months – Fixed
- \_\_\_\_\_ 60 Months – Fixed

**INCOME DISTRIBUTION OPTIONS: (Please check one)**

- \_\_\_\_\_ Reinvest - Interest to be paid by check upon written request
- \_\_\_\_\_ SEMI-ANNUAL (Interest to be paid by check on or about January 1 and July 1)
- \_\_\_\_\_ MONTHLY (Available only if investment is \$10,000 or more, interest to be paid by check)

**PAYABLE ON DEATH OPTIONS: (Please check one)**

\_\_\_\_ Yes, I would like to designate a P. O. D. beneficiary(ies).

Beneficiary(ies):

\_\_\_\_ No, I do not wish to designate a P. O. D. beneficiary at this time.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If yes, please include your designated beneficiaries.

Owner Initials _____
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