



**TEXAS
METHODIST
FOUNDATION**

PARTICIPATION REQUEST

Account Name: _____
Account No.: _____
Fixed Rate Investment: Interest Rate _____
Beginning Date _____
Maturity Date _____

TMF USE ONLY

Organization Name/Account Designation*	Tax I. D. Number
---	-------------------------

Contact Person	Phone Number	Fax	E-mail Address
-----------------------	---------------------	------------	-----------------------

STATEMENT INFORMATION
(Please select one option) monthly, quarterly, semi-annually, or annually

Attention _____

Street _____ City _____ State _____ Zip _____

(If more than one statement is required, please attach additional page)

ASSET ALLOCATION

Fixed Rate Investment – Methodist Loan Fund

Amount \$ _____

Term 1 year _____ 2 years _____ 3 years _____ 4 years _____ 5 years _____

AUTHORIZED SIGNERS *(Assign 2 or more; Printed Name)*

RESTRICTIONS *(if any)*

DISTRIBUTION OF INCOME
(Please select one option) on request (re-invest), monthly, quarterly, semi-annually, or annually

Address for payments:	Wire Instructions:	\$10.00 Fee for Outgoing Wires
_____	ABA No. (Routing No.)	_____
_____	Bank Name & City	_____
_____	Account Number	_____
_____	Name on Account	_____
_____	Recipient physical street address	_____
_____	_____	_____

Payable to: _____

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 Principal may not be withdrawn from this account before the maturity date without the consent of Texas Methodist Foundation, and a penalty will be charged for such early withdrawal. The penalty for an account with an original maturity date of a year or more is four (4) months interest on the amount withdrawn up to the amount of interest earned. The penalty will be charged first against any interest then in the account, and any excess will be deducted from the principal.

Upon maturity this account shall be automatically converted to a variable rate investment account unless the funds are withdrawn or another fixed rate investment opportunity is offered to and specifically chosen by the Participant.

MAKING AN INVESTMENT

Make checks payable to: Texas Methodist Foundation, Attn: Sara Beltran, 11709 Boulder Lane, Suite 100, Austin, Texas 78726

AUTHORIZATION

Please accept our Investment for management by Texas Methodist Foundation in accordance with the Investment Management Agreement with the Foundation:

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

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

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