

WISCONSIN UNITED METHODIST FOUNDATION
Participation in the Common Fund Investment Options 1 through 8
Election/Change Form

Churches or organizations have the option of changing your Investment Option for a Common Fund account, after a minimum of 12 months has passed from the date of your prior election. Only you can change this, as indicated below. The default allocation of all Common Fund Accounts is Option #3.

If you are making changes to more than one of your Foundation accounts, **PLEASE COPY THIS FORM, AND COMPLETE IT FOR EACH INDIVIDUAL ACCOUNT. DO NOT SIMPLY LIST ALL ACCOUNTS ON ONE FORM.** We require a completed form on each account to properly monitor the changes and authorizations being made.

ACCOUNT NUMBER: _____ **ACCOUNT NAME:** _____

INVESTMENT OPTIONS: If you wish to change the allocation of your Common Fund account, please choose your Investment Option by placing an "X" next to the appropriate Option either 1 through 8 below. If no option is selected, your funds will automatically be invested in Option 3.

Option 1 ☐ 75% Equity Pooled Fund & 25% Fixed-Income Fund

Option 2 ☐ 60% Equity Pooled Fund & 40% Fixed-Income Fund

Option 3 ☐ 50% Equity Pooled Fund & 50% Fixed-Income Fund

Option 4 ☐ 40% Equity Pooled Fund & 60% Fixed-Income Fund

Option 5 ☐ 30% Equity Pooled Fund & 70% Fixed-Income Fund

Option 6 ☐ 20% Equity Pooled Fund & 80% Fixed-Income Fund

Option 7 ☐ 10% Equity Pooled Fund & 90% Fixed-Income Fund

Option 8 ☐ 0% Equity Pooled Fund & 100% Fixed-Income Fund

**Name of Church Council, Board or
Group approving this change:**

Date change was approved:

Signature:

Title:

Printed Name:

Effective Date of change:

(must be a month-end). The Foundation must receive this notice at least 5 days before the effective date, or we will automatically make your election on the subsequent month-end.

Please return completed form to:

Wisconsin United Methodist Foundation

750 Windsor St. Suite 305

Sun Prairie WI 53590

Phone toll free: 1-888-903-9863 or 608-837-9582

Fax 608-837-2492