FLORIDA UNITED METHODIST *foundation*

FUMF FUNDS AGREEMENT

Number to be assigned by the foundation: ____________________

Church/organization/name of investor: ____________________

Address: ____________________

City: ____________________ State: __________ Zip: ____________________

Phone: ____________________ Website URL: ____________________

Federal Tax ID#: ____________________ GCFA# : ____________________

This AGREEMENT (hereinafter "agreement") is entered into as of the __________ day of ____________________ , 20 _____,

between (church name or name of organization or name of investor) ____________________
(hereinafter referred to as "you" or "your") and THE FLORIDA UNITED METHODIST FOUNDATION, INC. of Lakeland, Florida, (hereinafter referred to as "we," "us," "our" or "the foundation") regarding the receipt and management of certain assets. These assets will be referenced by named fund(s) specified in Appendix A of this agreement. You also acknowledge and agree that you have reviewed the acknowledgements set forth in Appendix A to this agreement and understand that this agreement is subject to the terms and conditions of our current investment disclosure statement.

With this agreement, you hereby appoint the foundation as your agent to hold, manage and distribute the assets of your fund(s) for the uses and purposes and upon the terms and conditions specified in this agreement. You authorize and instruct the foundation to receive and manage any transfers of cash, securities or other property, which from time to time may be transferred by you or others to the foundation for the benefit of your fund(s). You authorize us to receive and manage all income, dividends and profits of the assets placed in your fund(s) and to receive and manage any proceeds from redemption or sale of all assets transferred to us for the benefit of your fund(s). You authorize the foundation to vote and exercise all rights and options and to enter into or to approve agreements for merger, reorganization or equivalent transactions concerning any corporate stock or security in your fund(s). You may withdraw any or all of your assets with forty-five (45) days' advance written notice by the individual(s) so authorized through this agreement.

The foundation hereby agrees to accept, hold, manage and safely keep as your agent such gifts and transferred assets, which may be received from time to time from you or others and designated as part of your fund(s). We will collect and receive the income, dividends and profits of the assets placed in our charge under the terms of this agreement. We will provide to you a prompt acknowledgment of assets received by your fund(s) in our charge, and we will provide to you a full statement of account, at least quarterly, showing all transactions and dealings with assets in your fund(s) since the date of the last preceding statement. The foundation may employ other agents, persons, organizations or firms to provide counsel, act on our behalf or act under our direction regarding your assets and fund(s). Securities held by us under this agreement may be registered in the name of the foundation or our agent or other nominee, provided that our responsibility and liability is not be diminished by such registration.

This agreement may be terminated without cause or prejudice at any time either by you or the foundation with at least thirty (30) days' advance written notice. Upon termination, all of your assets that we manage under this agreement shall be paid over, delivered or surrendered to you within (forty-five) 45 days.

The foundation was established in 1966. Responsibility for governing the foundation is vested in a board of directors elected by the foundation's members. Investments managed by us are exempt from registration requirements of federal securities laws, pursuant to the exemption for collective investment funds and similar funds maintained by charitable organizations under the Philanthropy Protection Act of 1995. Investment decisions are made by professional money management firm(s) and executed by our broker, who is registered under federal securities laws. The foundation abides by The United Methodist Church's guidelines on socially responsible investing. Investments may fluctuate in value, reflecting market conditions. Investments are not guaranteed and may lose value. The foundation staff and board of directors monitor investments made under this agreement. The foundation is a not-for-profit organization dedicated to serving the financial, stewardship and charitable interests of United Methodists in Florida. For further information, please contact us.

Regular disbursements or requested withdrawals from your fund(s) will be sent by check made payable to the legal name (as indicated above for the church, agency, mission or organization) and will be mailed to the address on file.

Only the following individuals are authorized to change these investment instructions, request disbursements from the fund(s) or provide instructions regarding management of the fund(s). We do not require that signatures be notarized or guaranteed, and we will not be responsible or liable for following directions or instructions, which appear legitimate according to the terms of this agreement. If any of these individuals change, please notify us immediately and provide the name, office and a signature specimen of replacement for additional individual(s). Such changes must be authorized by other signatories or by an action of your board. Changes become effective when received in our office.

Number of signatures required for redemption/transfer instructions: _______

(Minimum of two signatures recommended. If left blank, the default is two signatures.)

1. ______________________________ ______________________________
NAME *(please print)* SIGNATURE

______________________________ ______________________________
TITLE PHONE/EMAIL

2. ______________________________ ______________________________
NAME *(please print)* SIGNATURE

______________________________ ______________________________
TITLE PHONE/EMAIL

3. ______________________________ ______________________________
NAME *(please print)* SIGNATURE

______________________________ ______________________________
TITLE PHONE/EMAIL

4. ______________________________ ______________________________
NAME *(please print)* SIGNATURE

______________________________ ______________________________
TITLE PHONE/EMAIL

5. ______________________________ ______________________________
NAME *(please print)* SIGNATURE

______________________________ ______________________________
TITLE PHONE/EMAIL

APPENDIX A

The Foundation shall receive assets for and manage the following fund(s) under this agreement:

NAME OF FUND: ______________________________

Initial deposit: $______________________ Check number: __________ Other: ______________

Invest this fund in: __________ % Fund 1 – Balanced Growth

__________ % Fund 2 – Aggressive Growth

__________ % Fund 3 – Long-term (open to investments July 31, 2021)

0 % TOTAL (must equal 100%)

Please select how you would like income and growth to be paid *(if left unchecked, interest will automatically be reinvested)*:

☐ Income to be automatically reinvested ☐ Income to be paid by check

450 MARTIN L KING JR AVENUE, LAKELAND, FL 33815 | P: 866-363-9673, X7000 F: 863-904-0169 | FOUNDATION@FUMF.ORG | WWW.FUMF.ORG

Investor (church/agency/conference/organization authorized signer):

Signature: ____

Name: ______________________________ Title: ______________________________

Email: ______________________________ Phone: ______________________________

The Florida United Methodist Foundation, Inc.:

Signature: ____

Name: ______________________________ Title: ______________________________

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