



Information for New Managed Fund Account

Date:

Church/Institution Name:

Address:

Phone:

Name of Fund:

UMFWNC Fund Selected (Income Only, Conservative, Balanced, Diversified, All Equity):

Initial investment to create account: \$

Governing Body over the account (i.e.: Church Council, Finance Committee, etc.):

Person authorized to sign to create account:

Contact information for that authorized signer (email if signing electronically):

Statement frequency (monthly, quarterly, semi-annually, annually):

Individual(s) responsible for maintaining this account:

Email address(es) for those individuals:

Information compiled by: