

INSTITUTIONAL INVESTMENT APPLICATION

FOR OFFICE USE ONLY

Date Received _____

Account # _____

INSTITUTION INFORMATION *(Please Print)*

Institution: _____

Address: _____ City: _____ State: _____ Zip: _____

Telephone: _____ Fax: _____

EIN: _____ E-mail address: _____

AUTHORIZED REPRESENTATIVES

The following representatives are authorized to make decisions on the institutional investment account and to request withdrawals on behalf of the institution. (If more than four, please attach a paper with full name, social security number, telephone, email and position)

1) Name: _____ SS#: _____

Telephone: _____ E-mail Address: _____

Position: _____

2) Name: _____ SS#: _____

Telephone: _____ E-mail Address: _____

Position: _____

3) Name: _____ SS#: _____

Telephone: _____ E-mail Address: _____

Position: _____

4) Name: _____ SS#: _____

Telephone: _____ E-mail Address: _____

Position: _____

INVESTMENT SELECTION

You may invest in one or all investment strategy options. Please indicate the percentage of your investment that you want invested in each strategy (must total 100%). If no choice is made, all funds will remain in the Default strategy. Your investment allocation can be changed monthly (transfers are based on prior month's ending balance).

Investment Options	Percentage
The Conservative Strategy	_____ %
The Moderate Strategy	_____ %
The Default Strategy	_____ %
The Maximum Strategy	_____ %
The Disciplined Value Strategy	_____ %
Total	_____ %

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CERTIFICATION

The institution requests that the Board of Retirement invest our accumulations/contributions based upon our investment choices above. The institution has reviewed the information provided by the Board of Retirement and has made this selection based upon our own investment judgment. The institution also realizes that past results are not a guarantee of future performance.

Print Name: _____

Authorized Signature: _____ Date: _____

REFERRAL

How did you hear about us? _____

You should consider the investment objectives, risks and charges and expenses carefully before investing. Past performance does not guarantee future results.

The investment account provided by the Board of Retirement & Insurance is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency.

Neither the Board of Trustees nor the staff of the Board of Retirement are engaged in rendering financial advice, legal advice, or other financial planning services. If such advice is desired or required, the services of a competent professional should be sought.



FREE WILL BAPTIST BOARD OF RETIREMENT
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