

Participation Agreement Instructions:

*If you need assistance completing the agreement, call 1-844-209-4631.*

1. Initial Investment

This section only needs to be filled out if you are a new participant. Current participants can leave this blank.

2. Account Type

Your tax identification number, also known as an Employer Identification Number or EIN, was issued to you by the IRS. The number has two digits, a hyphen, followed by seven digits.

Almost all churches are incorporated. If you have a different legal form, please indicate. If you are uncertain, you can contact the Connecticut Secretary of State. Checking "Other" and describing entity as "Unknown" is an acceptable response.

3. Account Information

"Name of entity" is the legal name of the participant.

Account name(s) can be used to indicate the name of accounts. If you are an existing participant and all of your account names are listed accurately, you can write in "Per existing reports."

Contact information: Please provide for the participant.

Authorized Person Names: List the people who are authorized to make transactions and change account information. Authorized persons can also add or change authorized persons.

4. Telephone Authorization

Authorized persons will be able to provide transaction instructions over the telephone unless the participant opts out. Exchanges are transfers between accounts. Redemptions are withdrawals.

5. Income Distribution Payment Options

Income is interest and dividends received. Income can be reinvested (added to the account balance) or distributed. If distributions are requested, distributions can be made by check or Electronic Funds Transfer. Most participants reinvest income.

6. Systemic Withdrawal Plan (Optional)

If you want to set up or continue recurring monthly distributions, please

indicate the amount for each account. You can refer to an attached sheet. If recurring monthly distributions are already set up and you want to continue them, you can write in "Continue per instructions on file."

7. Bank Account Information (Optional)

If you want to use Electronic Fund Transfers for purchases (additions) or redemptions (withdrawals), please provide bank account information.

8. Duplicate Mailing Address

Statements and other correspondence will be mailed to the address listed in Section 3. If you would like a duplicate set of documents to be mailed to a different address, for example, the participant's treasurer's home address, please provide the address.

9. Signature and Certifications

Anyone that the participating organization has authorized to enter into investment agreements can sign the document. Often this will be the Treasurer of the participant, but other trustees or officers may also be authorized.