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Toll Free (800) 768-6040 Ext 121
Email: VaFoundationUMC@vaumc.org
Website: www.vaumfgifts.org

FOUNDATION & FINANCE USE ONLY

Received date: _____

Assigned Account #: _____

ACCOUNT INFORMATION SHEET

☐ New account: ☐ Account(s) update: Account #(s): _____

New Account Name: _____
Church Name: _____
Mailing address: _____
City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
District: _____ GCFA #: _____

ACCOUNT PURPOSE

☐ General Investment
☐ Endowment: ☐ Restricted ☐ Unrestricted
Withdrawal Restriction(s):
☐ Yes ☐ No

Please attach a copy of the endowment resolution
and/or restriction(s).

ASSET ALLOCATION

_____ % Balanced fund
_____ % Stock fund
_____ % Bond fund
_____ % Money Market fund
_____ % Total

☐ Apply to all future deposits ☐ Maintain current allocation(s)

AUTHORIZED SIGNERS

Authorized name: _____ Position: _____
Mailing address: _____
City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
Signature: _____ Date: _____

Receive statements: ☐ Email ☐ Postal mail ☐ No

Authorized name: _____ Position: _____
Mailing address: _____
City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
Signature: _____ Date: _____

Receive statements: ☐ Email ☐ Postal mail ☐ No

Authorized name: _____ Position: _____
Mailing address: _____
City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
Signature: _____ Date: _____

Receive statements: ☐ Email ☐ Postal mail ☐ No

Authorized name: _____ Position: _____
Mailing address: _____
City: _____ State: _____ Zip: _____
Email: _____ Phone: _____
Signature: _____ Date: _____

Receive statements: ☐ Email ☐ Postal mail ☐ No

CHURCH COUNCIL CERTIFICATION

Senior Pastor name: _____ Signature: _____ Date: _____
Authorized Lay Person name: _____ Signature: _____ Date: _____