



BALANCED PLUS FUND INVESTMENT AUTHORIZATION

10330 Staples Mill Road

Glen Allen, VA 23058

www.VAUMFGifts.org

foundation@vaumc.org

804.521.1121 or 1-800-768-6040 ext. 121

Account #: _____ Account name: _____

	DEPOSIT TO	TRANSFER FROM	PROCESS VIA:
Check:	# _____		
Balanced Fund:	\$ _____	\$ _____	___ Check
Balanced Plus Fund:	\$ _____	\$ _____	
Stock Fund:	\$ _____	\$ _____	___ EFT** on file
Bond Fund:	\$ _____	\$ _____	**Submit EFT form located at:
Total	\$ _____	\$ _____	vaumfgifts.org/?pageID=1005

As authorized signors for _____ United Methodist Church, we recognize that our deposits and/or transfers to the Balanced Plus portfolio are designed for long-term, permanent endowment funds, and that withdrawals will be limited for those funds to once a month. We further recognize that Alternative Investments – which may comprise up to 30% of the Balanced Plus Fund – are not readily liquid-able and may not be able to be screened to meet the Socially Responsible Investing Principles of the Book of Discipline.

AUTHORIZATION

1st Authorized person's name: _____

Email address _____

Phone number: _____

Signature: _____

Date _____

2nd Authorized person's name: _____

Email address: _____

Phone number: _____

Signature: _____

Date: _____