



THE UNITED METHODIST FOUNDATION

of the Texas Annual Conference

5215 Main Street

Houston, TX 77002

Phone: 713-533-3780 * Fax: 713-533-3781

INVESTMENT AGREEMENT

Account #: _____

This Agreement is entered into by and between the UNITED METHODIST FOUNDATION OF THE TEXAS ANNUAL CONFERENCE, located in Houston, Texas (the "Foundation"), and _____, located in _____ (the "Church"). The parties hereto agree as follows:

1. A. There is hereby created in the Foundation, the _____ (the "Fund"), which will be maintained by the Foundation for the benefit of the Church.

B. The initial deposit is \$_____, received on _____. Additional deposits to the Fund may be made at any time through marketable gifts of cash, stocks, bonds, or any other gift mutually acceptable to the Foundation and the Church.

2. Earnings on the Fund are determined by the investment pool or pools utilized, maintained by the Foundation, according to the Portfolio Selection Form, incorporated as an addendum to this Agreement. The Foundation's Investment Policy Statement provides detailed information on each investment pool. A management fee may be deducted from the gross earnings of the Fund by the Foundation.

3. Income and market changes to the Fund, where applicable, will be posted to the account and a periodic statement, issued quarterly, will report that information.

4. A. Withdrawals of interest and/or principal will be made in accordance with the provisions of the individual investment pool chosen and will be made upon written instructions.

B. Withdrawals may be authorized by any_____(1 or 2, etc) of the following officers (list titles only):

1. _____

2. _____

3. _____

5. This Agreement may be amended at any time by agreement of the Foundation and the Church in writing.

In witness thereof, the Foundation and Church have executed this agreement effective as of _____, 2008.

UNITED METHODIST FOUNDATION
OF THE TEXAS ANNUAL CONFERENCE

Foundation Name

Church or Agency Name

By: _____
Name: _____
Title: _____

By: _____
Name: _____
Title: _____

Date: _____

Date: _____