UNITED METHODIST FOUNDATION OF NEW ENGLAND

INSTRUCTIONS FOR OPENING A NEW ACCOUNT

I. Trust Agreement

- After reviewing the Trust Agreement, please have two Trustees of your church fill in the name and address of the church on the front and sign and date the back of the form.

II. Schedule A

- Your church needs to select two Contact Persons who will serve as liaisons for the church when communicating with the Foundation; please have the Primary and Second Contact Persons complete Schedule A. The Primary Contact Person should print and sign their name and include the address to which they wish to receive correspondence, quarterly statements, etc. The Second Contact Person should then print his/her name, include their telephone number and then sign where indicated. Please include each contact's e-mail address if available. Please make a copy for your files and return the original to us.

III. Investment Direction Form

- The New Account Deposit Form needs to be completed and returned along with a check (minimum amount to open an account is $2,500) made out to UMFNE (United Methodist Foundation of New England). Indicate which Model Portfolio you wish to invest in. Please remember to indicate whether you want the quarterly dividends to be reinvested or paid. The Primary Contact Person will need to sign the bottom of the form where indicated.

All three forms along with a check for deposit need to be returned together. Once our President signs the Trust Agreement, a copy will be returned to the Primary Contact Person along with an Informational Folder containing transaction forms and other information sheets that will aid him/her in doing business with the Foundation.