



United Methodist
Foundation of
New England

For Office Use Only:

Initials _____ Transaction # _____

INVESTMENT DIRECTION FORM

Reallocation of Assets

Use one form for each account

Name of Church or Agency

City

ST

Name of Account

Account Number

Date

FROM MODEL: _____

TO MODEL: _____

Model Portfolios
Stock Model
Alternative Investment Model
Endowment Model
Endowment Model – Reinvested
Balanced Growth Model
Balanced Income Model
Fixed Income Model
Money Market
Capital Appreciation Model
Weighted Growth & Income Model
Moderate Growth & Income Model
Weighted Income & Growth Model
Income & Capital Preservation Model

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Contact Person's signature

(Please print name)

(____)_____
Daytime Telephone