



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 (100%)
Endowment Model (60/40)
Endowment Model - Reinvested (60/40)
Balanced Growth Model (60/40)
Balanced Income Model (40/60)
Fixed Income Model (100%)
Money Market
Custom (80/20) Model
Custom (70/30) Model
Custom (50/50) Model
Custom (30/70) Model
Custom (20/80) Model

1

Contact Person's signature

(Please print name)

(_____)_____
Daytime Telephone