



PERSONAL INVESTMENT APPLICATION

APPLICANT INFORMATION

PLEASE PRINT CLEARLY.

Must be at least 18 years old. If to be titled in trust, application must accompany first and last page of trust document.

Name: _____

Street Address: _____

City/State/Zip: _____

Phone: _____ Email: _____

Date of Birth: ____ / ____ / ____ Social Security #: _____

Name of Elementary School: _____

Full Name of Your Oldest Cousin: _____

Name of Local Church: _____

JOINT APPLICANT INFORMATION

PLEASE PRINT CLEARLY.

Must be at least 18 years old. One or more owners with full rights of survivorship and not tenants in common.

Interest is reported to the IRS using the Social Security number of the first owner listed.

Name: _____

Street Address: _____

City/State/Zip: _____

Phone: _____ Email: _____

Date of Birth: ____ / ____ / ____ Social Security #: _____

Name of Elementary School: _____

Full Name of Your Oldest Cousin: _____

Name of Local Church: _____

INVESTMENT SELECTION

Flexible Demand Note

Minimum \$50 investment

Flexible Demand Plus Note

Minimum \$100 monthly ACH deposit

3-Month Term Note

Minimum \$500 investment

6-Month Term Note

Minimum \$500 investment

13-Month Term Note

Minimum \$10,000 investment

12-Month Term Note

Minimum \$500 investment

24-Month Term Note

Minimum \$500 investment

36-Month Term Note

Minimum \$500 investment

36-Month Creation Care Term Note

Minimum \$500 investment at 3.000% per annum

60-Month Term Note

Minimum \$500 investment

60-Month Term Note with Giving Bonus

Minimum \$10,000 investment

INVESTMENT SOURCE

PLEASE SELECT ONE:

New Investment: \$ _____

Check enclosed. All checks payable to United Church of Christ Cornerstone Fund, Inc.

Reinvestment of Matured Note (#: _____)

PLEASE SELECT ONE: Entire Balance Principal Only Portion of Note (\$ _____)

Transfer from Note (#: _____)

Date

Signature of Joint Owner or Trustee Date

INTEREST DISTRIBUTION *PLEASE SELECT ONE.*

- Accrue (add) to my investment semi-annually.
- Pay directly.
PLEASE SELECT ONE. Semi-annually Quarterly Monthly (for balances of \$10,000 or more)
- PLEASE SELECT ONE.* Pay by check. Direct deposit to bank account (attach voided check)

Bank Name: _____

- The Cornerstone Fund is able to serve as your designated beneficiary via the Living Stones Endowment Fund. [Click here to select this option.](#)

PAPER DOCUMENT DELIVERY OPT IN

- In the interest of protecting the environment and reducing costs, we are switching to all electronic document delivery. If you would like to continue receiving our documents via paper mail, you must opt in by checking this box.

FOR FLEXIBLE DEMAND PLUS NOTES ONLY *PLEASE PRINT CLEARLY.*

I authorize the United Church of Christ Cornerstone Fund, Inc. and the respective Bank to initiate a monthly withdrawal in the amount of \$ _____ (a required minimum \$100 per month) on the *(CIRCLE ONE)* **1st** or **15th** of each month. I also authorize the United Church of Christ Cornerstone Fund, Inc. and the respective Bank to initiate credit and/or necessary credit entries or adjustments for any debit/credit in error to my account listed below.

ACCOUNT TYPE *PLEASE SELECT ONE.*

- Checking Account *(Attach voided check)*
- Savings Account *(Attach deposit slip)* Routing #: _____ Account #: _____

FOR BUILDER BONUS 60-MONTH TERM NOTES, ONLY. *PLEASE PRINT*

You are instructed to forward \$ _____ (a minimum of 10% of the note amount) to the following United Church of Christ church, Association, Conference, or related organization or entity as a gift.

Name of Church or Entity: _____

Purpose or Designation: _____ Contact Name: _____

Street Address: _____ City/State/Zip: _____

CERTIFICATIONS

I hereby acknowledge receipt of the Offering Circular of the United Church of Christ Cornerstone Fund, Inc. (Cornerstone Fund) and further represent that I/we are members of, contributors to (including investors), or participants in the United Church of Christ or the Cornerstone Fund or in any program, activity or organization which constitutes a part of the United Church of Christ or Cornerstone Fund, Inc. or in any other protestant church organizations which have a programmatic relationship with the United Church of Christ or the Cornerstone Fund, Inc.

Further, under penalties of perjury, I certify (1) that the number shown on the forms is my correct taxpayer identification number, and (2) that I am not subject to backup withholding because (a) I have not been notified that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (b) the Internal Revenue Service has notified me that I am no longer subject to backup withholding.

EVERY PENNSYLVANIA PURCHASER OF THE SECURITIES DESCRIBED IN THIS APPLICATION HAS THE RIGHT TO WITHDRAW FROM THE PURCHASE WITHIN TWO BUSINESS DAYS. SEE PAGES iii AND iv OF THE OFFERING CIRCULAR FOR MORE INFORMATION AND INSTRUCTIONS.

MAKE ALL CHECKS PAYABLE TO UNITED CHURCH OF CHRIST CORNERSTONE FUND, INC. *To confirm acceptance, the Cornerstone Fund, Inc. will mail to the person to whom interest on the Note is payable an executed copy of the Note purchased.*