

**APPLICANT INFORMATION** PLEASE PRINT CLEARLY.

*Must be at least 18 years old. If to be titled in trust, application must accompany full trust documents*

Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Date of Birth: \_\_\_\_ / \_\_\_\_ / \_\_\_\_ Social Security #: \_\_\_\_\_

**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 #: \_\_\_\_\_

**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*

**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**  
*If selected, choose Giving Bonus(es)*

**LGBTQIA+ Giving Bonus**  
*Minimum \$2,500 investment*

**Racial Equity Giving Bonus**  
*Minimum \$2,500 investment*

**Church Giving Bonus**  
*Minimum \$10,000 investment*

**Mission Giving Bonus**  
*Minimum \$25,000 investment*

**INVESTMENT SOURCE** PLEASE SELECT ONE

**New Investment by Check \$\_\_\_\_\_**  
*Check enclosed. All checks payable to the United Church of Christ Cornerstone Fund, Inc.*

**Reinvestment of Matured Note (#\_\_\_\_\_)**  
PLEASE SELECT ONE  Entire Balance  Principal Only  Portion of Note (\$\_\_\_\_\_)

**Transfer From Note (#\_\_\_\_\_)**

**New Investment by ACH \$\_\_\_\_\_**

Checking Account (*attached voided check*)

Savings Account (*attached deposit slip*)

Routing # \_\_\_\_\_

Account # \_\_\_\_\_

**PERSONAL INVESTMENT APPLICATION**

**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 (attached voided check)
- Bank Name: \_\_\_\_\_

Signature

\_\_\_\_\_ Date

Signature of Joint Owner or Trustee

\_\_\_\_\_ Date

**PAPER DOCUMENT DELIVERY OPT-IN**

- All Cornerstone Fund documents are delivered electronically in order to help protect the environment and reduce costs. If you need to receive paper documents from us, please check this box to opt in.

**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 (attached voided check)
- Savings Account (attached deposit slip) Routing # \_\_\_\_\_ Account # \_\_\_\_\_

**FOR GIVING BONUS 60-MONTH TERM NOTES ONLY** *PLEASE PRINT CLEARLY*

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: \_\_\_\_\_

**CONTINUED ON PAGE 3**

**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 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 THE 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*

1300 East 9th Street, #1605 Cleveland, Ohio 44114  
**888-UCC-FUND (822-3863) - [cornerstonefund.org](http://cornerstonefund.org)**