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## Rebalance, Set Default Allocation, and Contribution Authorization

Clients who have a signed Investment Management Agreement will use this form to create a new account.

Church / Organization Name: Date: Account Name: Account Number: Unless specified per transaction on the Withdrawal Form, the *Default Allocation* determines the allocation of contributions and withdrawals. This form will establish or change your Default Allocation ... do a one-time **Rebalance** of 100% of the account(s) ... allocate your **Contribution** differently from the current **Default Allocation**. \*Optional: use the box below for specific instructions.\* Making a Contribution? Amount: \$\_\_\_\_\_ \*Write specific instructions below, such as: "Move \$10,000 from Conservative to Moderate." Check all that apply: "Automatically rebalance to the default ☐ Rebalance ☐ Default Allocation ☐ Contribution allocation at the end of the year." Aggressive (85% stocks, 15% fixed income) Climate Solutions<sup>†</sup> Agg: \$ % Agg Climate: \$ % Moderate (60% stocks, 40% fixed income) Mod: \$ % Mod Climate: \$ \_\_\_\_\_\_ % Conservative (30% stocks, 70% fixed income) Con: \$ \_\_\_\_\_\_ % Con Climate: \$ \_\_\_\_\_ % Short-Term:<sup>††</sup> \$\_\_\_\_\_% Money Market: Activity received after the end of the month and by the 15<sup>th</sup> will be fulfilled by the end of the current month. Activity received after the 15<sup>th</sup> and by the end of the month will be fulfilled by the 15<sup>th</sup> of the following month. Authorized Signers (Note: Only one person needs to sign for contributions and/or to create a new account. To Rebalance and/or change the Default Allocation requires the Org's designated minimum number of signers.) 1. NAME (Please Print) **SIGNATURE** DAYTIME PHONE # TITLE **EMAIL ADDRESS** 2. (Please Print) **SIGNATURE** NAME TITLE DAYTIME PHONE # **EMAIL ADDRESS** 3. (Please Print) **SIGNATURE** NAME TITLE DAYTIME PHONE # **EMAIL ADDRESS** <sup>†</sup> The Climate Solutions models "exclude fossil fuels and companies involved in major environmental controversies, while

allocating to companies involved in creating solutions for climate related issues."

<sup>&</sup>lt;sup>††</sup> The core holding is a PIMCO fund with a "diversified portfolio of primarily high-quality bonds that is actively managed in an effort to limit interest rate exposure while maximizing returns in a risk-managed framework." (Form Rev. 11/14/2023)