

## SUBSCRIPTION AGREEMENT (DEMAND) FOR CHURCHES/AGENCIES

This Subscription Agreement (the "Agreement") is made by and between the Rocky Mountain United Methodist Foundation, Inc., a Colorado non-profit corporation (the "Foundation"), administrator of the Methodists Helping Methodists Fund (the "Fund"), and the undersigned prospective investor who is subscribing for Demand Certificates of Participation (the "Demand Certificates") in the Fund to be issued by the Foundation pursuant to the Offering Circular, as amended from time-to-time and including all exhibits and attachments thereto (collectively, the "Offering Circular").

The undersigned hereby irrevocably subscribes for and agrees to purchase Demand Certificates in the principal amount indicated on the signature page hereof. Simultaneously with the execution of this Agreement, the undersigned is making the payment set forth on the signature page (the "Payment"), in the form of a check, money order, banker's draft or wire transfer made payable to or deposited into the account of the Methodists Helping Methodists Fund.

The undersigned hereby represents and warrants to the Foundation as follows:

A) The Demand Certificates are being purchased for the undersigned's own account for investment purposes only, not for the account of any other person and not with a view to distribution, assignment or resale to others.

B) The undersigned has been furnished with and has carefully read the Offering Circular, including but not limited to the information disclosed under "Risk Factors." The undersigned is familiar with and understands the terms and condition of the Certificates, the terms of this Offering and the proposed activities of the Methodists Helping Methodists Fund (the "Fund"). The undersigned has been afforded the opportunity to discuss the Demand Certificates and the proposed activities of the Fund with its representatives and to obtain all additional documents and information requested by the undersigned relating to the Demand Certificates.

C) The undersigned agrees to look only to those assets of the Fund for repayment of the principal amount of the Demand Certificates and interest thereon. Such assets will consist solely of payments received by the Fund with respect to Mortgage Loans made by it, as well as the investments and cash reserve that the Fund intends to maintain with respect to the Certificates, all as more fully described in the Offering Circular.

D) With respect to tax and other financial considerations involved in this investment, the undersigned is not relying on any advice or opinions from the Foundation or any person acting on its behalf. The undersigned has carefully considered and has, to the extent the undersigned believes appropriate, discussed with his or her legal, tax, accounting and financial advisors the suitability of an investment in the Demand Certificates for his or her particular tax and financial situation and has determined that the Demand Certificates for which the undersigned is subscribing are a suitable investment.

E) The undersigned will indemnify and hold harmless the Foundation and any officer, employee, director, member, control person, agent or representative of the Foundation who was or is a party or is threatened to be made a party to any threatened, pending or completed action, suit or proceeding, by reason of or arising from any breach of the undersigned's warranties, covenants or agreements set forth herein against losses, liabilities and expenses for which any such indemnified person actually and reasonably incurred by the Foundation or such person in connection with such action, suit or proceeding.

F) This agreement shall be enforced, governed, and construed in all respect in accordance with the law of the State of Colorado, shall be binding upon the undersigned, the undersigned's heirs, estate, legal representatives, successors and assigns and shall inure to benefit of the Foundation, its successors and assigns.

G) Please indicate how you wish to receive your interest payments:

\_\_\_\_\_ by ACH directly to your checking/savings account (provide a cancelled check)

or

\_\_\_\_\_ an increase in the principal amount of the account (default option)

H) We wish to subscribe, as follows, on behalf of the United Methodist Church named below.

Principal amount of Demand Certificate subscribed for \$ \_\_\_\_\_

Dated \_\_\_\_\_ (month, day, year)

**Authorization of Investment**

This certifies that the Administrative Board/Council of the \_\_\_\_\_

United Methodist Church, at \_\_\_\_\_

\_\_\_\_\_ (address, city, state, zip)

adopted the following resolution: Resolved that members of the \_\_\_\_\_ Committee

authorize that \$ \_\_\_\_\_ be invested in a Certificate of Participation in the ðMethodists

Helping Methodistsö Fund, issued by the Rocky Mountain United Methodist Foundation, Inc.

Dated \_\_\_\_\_ (month, day, year)

Signed:

\_\_\_\_\_ (date)

Chair, Ad Board/Council

\_\_\_\_\_ (date)

Senior Pastor

\_\_\_\_\_ (date)

Church Treasurer

\_\_\_\_\_ (date)

Chair, Finance/Endowment Committee

Accepted this date \_\_\_\_\_  
Rocky Mountain United Methodist Foundation, Inc.  
A Colorado non-profit corporation on behalf of the  
Methodists Helping Methodists Fund

By: \_\_\_\_\_  
Executive Director

# Authorized Signature and Online Access Card

This card replaces all previous Authorized Signature Cards. If Authorized Signers want to have online access, please include the Signer's birthdate where indicated. Spaces are also provided for those who are not Authorized Signers but who request online access *only*.



\_\_\_\_\_ Effective Date  
 \_\_\_\_\_ Church/Organization Name & City  
 \_\_\_\_\_ Account Number(s)

*Please complete one form per account if Authorized Signers differ.*

Primary contact name \_\_\_\_\_ Phone \_\_\_\_\_ Email \_\_\_\_\_  
*(Requested for confirmation and correspondence)*

Number of signatures required for withdrawals & transfers: \_\_\_\_\_  
*(At least two required)*

**Printed name** \_\_\_\_\_

Signature \_\_\_\_\_

Position \_\_\_\_\_

Phone/email \_\_\_\_\_

Authorized Signer  Online Access and Electronic Statements

*For Online Access and E-Statements, provide Birthdate and Social Security #*

DOB \_\_\_\_\_ SS # \_\_\_\_\_

**Printed name** \_\_\_\_\_

Signature \_\_\_\_\_

Position \_\_\_\_\_

Phone/email \_\_\_\_\_

Authorized Signer  Online Access and Electronic Statements

*For Online Access and E-Statements, provide Birthdate and Social Security #*

DOB \_\_\_\_\_ SS # \_\_\_\_\_

**Printed name** \_\_\_\_\_

Signature \_\_\_\_\_

Position \_\_\_\_\_

Phone/email \_\_\_\_\_

Authorized Signer  Online Access and Electronic Statements

*For Online Access and E-Statements, provide Birthdate and Social Security #*

DOB \_\_\_\_\_ SS # \_\_\_\_\_

**Printed name** \_\_\_\_\_

Signature \_\_\_\_\_

Position \_\_\_\_\_

Phone/email \_\_\_\_\_

Authorized Signer  Online Access and Electronic Statements

*For Online Access and E-Statements, provide Birthdate and Social Security #*

DOB \_\_\_\_\_ SS # \_\_\_\_\_

**Printed name** \_\_\_\_\_

Signature \_\_\_\_\_

Position \_\_\_\_\_

Phone/email \_\_\_\_\_

Authorized Signer  Online Access and Electronic Statements

*For Online Access and E-Statements, provide Birthdate and Social Security #*

DOB \_\_\_\_\_ SS # \_\_\_\_\_

**Printed name** \_\_\_\_\_

Signature \_\_\_\_\_

Position \_\_\_\_\_

Phone/email \_\_\_\_\_

Authorized Signer  Online Access and Electronic Statements

*For Online Access and E-Statements, provide Birthdate and Social Security #*

DOB \_\_\_\_\_ SS # \_\_\_\_\_

**Authorized Signers, Online Access, and Electronic Statement Recipients authorized by:**

**Printed name** \_\_\_\_\_

Signature \_\_\_\_\_

Position \_\_\_\_\_

Email \_\_\_\_\_

**All fields must be completed or the form may be returned to the church.  
 Questions may be directed to the Foundation at [info@RMUMF.org](mailto:info@RMUMF.org) or 303.778.6370**

For Internal Use Only Sig ____ FW ____ Ack ____ DDI ____ Scan ____
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## **Authorized Signature Card Policy**

**Purpose:** The Foundation will maintain security and streamline authorized signer confirmation of all church investment accounts by requiring the church to update the Authorized Signature Card (ASC) when any change is made to current ASCs in each church's portfolio.

Common changes include:

1. Removal of a Signer (due to death, departure from the church, completion of the Signer's term, etc.)
2. Addition of a Signer
3. Addition of an account

A church may have multiple ASCs if there are different Authorized Signers on different accounts.

The Foundation will not accept an "addendum" ASC to attach to a current ASC. When Signers are added or removed, or an account is added or closed, a new ASC must be submitted.

The Foundation will only honor a transfer or withdrawal request with signatures that match a current ASC.

Authorized Signature Cards are available for downloading and printing from the Foundation's website, [www.RMUMF.org/Forms](http://www.RMUMF.org/Forms). Click on the Authorized Signature Card link under "Forms for Churches."

Authorized Signature Cards may also be requested from the Foundation office by calling, 303.778.6370, or emailing, [info@RMUMF.org](mailto:info@RMUMF.org)