



The Combined Fund Initial Purchase Application

REQUIRED DOCUMENTATION:

- **Proof of 501c3 filling**
- **Formation documentation (e.g., Certificate of Incorporation, Articles of Organization, Secretary of State Filing)**
- **Date of organization should be on one of these documents to expedite account opening process**
- **Bylaws (helpful if available)**

Investor Name		Account Number <i>To be assigned by TFE</i>	
Legal Name of Benefiting Parish/Entity			
Legal Address of Benefiting Parish/Entity			
Tax Identification Number of Benefiting Parish/Entity			
Name of Fund (Building Fund, Smith Memorial, etc.)			
Purchase Instructions (check one)			
☐ Long-Term Account ☐ Mid-Term Account ☐ Short-Term Account ☐ Money Market Account			
Income Instructions (check one)		Reinvest Income into The Combined Fund	
		Distribute Income*: Quarterly (Long-Term Account only)	
		Distribute Income*: Annually (Long-Term Account only)	
		Accumulate Income in the Money Market Fund (Long-Term Account only)	
Amount of initial Deposit \$		Notes/Comments:	
Send this form and the required documentation listed at the top to Jim Wenzler, Executive Director, at director@tfewis.org			

Signature

On behalf of the parish/entity, I sign this application and certify that the taxpayer identification number is correct.

I understand that scheduled income distributions will be sent according to instructions on file with TFE and JP Morgan. For changes to distribution instructions, please contact Jim Wenzler.

Signature:

Date:

Type or Print Name:

Title:

Acceptance on behalf of Trustees of Funds and Endowments, Inc.

By:

Date: