

## Investment Account Enrollment Form

### Part 1 – General Information

Organization name	Address
Legal entity name if different from above	
Taxpayer ID number / EIN	
New account name	Primary phone number
Country of incorporation	Alternate phone number

### Part 2 – Target Allocation

Please complete the following information. Enter your investment election in 1% increments; the total must equal 100%. If the total does not equal 100%, the form is invalid and will be returned.

**Note:** If you do not make an election, your funds will be invested 100% in the Multiple Asset Fund - I Series (MAF-I).

Fund Name	Allocation for Account
Fixed Income Fund– I Series (51C)	%
Inflation Protection Fund– I Series (52C)	%
International Equity Fund– I Series (53C)	%
Multiple Asset Fund– I Series (54C)	%
Short Term Investment Fund– I Series (55C)	%
U.S. Equity Fund– I Series (57C)	%
U.S. Equity Index Fund– I Series (58C)	%
U.S. Treasury Inflation Protection Fund– I Series (59C)	%
<b>Total</b>	<b>100%</b>

### Part 3 – Automated Clearing House (ACH) or Wire Transfers

ACH information is necessary to make electronic deposits and withdrawals between your bank or financial institution and Wespath.

Wire information is necessary to withdraw funds from your Wespath account(s) to your bank or financial institution.

Please include the information on the right:

Institution name
Institution address
Account name
Routing number _____
Account number
Account type <input type="checkbox"/> Checking <input type="checkbox"/> Savings
Transfer type <input type="checkbox"/> ACH <input type="checkbox"/> Wire

*(continued)*



## Investment Account Enrollment Form (continued)

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### Part 4 – Signature

Print name of signatory 1*	_____	Title	_____
Signature on behalf of account holder	_____	Date	_____
Print name of signatory 2*	_____	Title	_____
Signature on behalf of account holder	_____	Date	_____

\*Two signatures are required.

- ▶ Please complete this form and send it by:
- E-mail (scanned copy) to **support@wespath.org**
  - Fax to **1-847-866-4894**
  - Mail to **Wespath Institutional Investments**  
**1901 Chestnut Avenue**  
**Glenview, IL 60025-1604**

Be sure to provide a copy of your organization's articles of incorporation or certificate in good standing from your Secretary of State, and keep a copy for your records.

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### Part 5 – For Wespath Use Only

Account number \_\_\_\_\_

