

## Investment Account Enrollment Form for Existing Clients

### Part 1 – General Information

Organization name \_\_\_\_\_

Primary phone number \_\_\_\_\_

\_\_\_\_\_

Alternate phone number \_\_\_\_\_

New account name \_\_\_\_\_

\_\_\_\_\_

### 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:

\* Two signatures are required if new banking instructions are added.

Institution name \_\_\_\_\_

Institution address \_\_\_\_\_

Account name \_\_\_\_\_

Routing number \_\_\_\_\_

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

Account type  Checking  Savings

Transfer type  ACH  Wire



## Investment Account Enrollment Form for Existing Clients (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	_____

\* One signature required for new account.

\*\* Two signatures are required if new banking instructions are added.



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**

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### Part 5 – For Wespath Use Only

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

