



United Methodist Foundation of West Virginia, Inc. Investment Fund Change Request Form

Date: _____

Church / Ministry Name: _____

Your name: _____ Phone Number _____

Foundation account: *(please provide account name or account number)*

Account Number: _____

Account Name: _____

Investment Fund Choice

Current Investment Fund: _____ New Investment Fund: _____

Instructions: *(Please check one)*

- Move entire market value of the account to the new Investment Fund
- Move money as outlined below:

Signature

Signature

Printed Name

Printed Name

Office

Office

You can mail, fax or email this form to us. Additional forms can be downloaded from our website. This form is NOT REQUIRED for an Investment Fund change; a written request signed by the appropriate officers as outlined in the account Agreement will always suffice. Thank you for including the Foundation in the work of your ministry. If you have questions or if we can help you, please call.

United Methodist Foundation of West Virginia, Inc.

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