

FREE METHODIST LOAN FUND ROLLOVER INVESTMENT APPLICATION

1. Certificate Ownership

Name of primary: _____ Investor Number: _____
 Joint/Custodian: _____ Certificate#: _____ Balance: _____

2. Select the Term

Please transfer the entirety of my Term Certificate, to be invested as indicated below.

<u>Description</u>	<u>Minimum Amount</u>	<u>Investment</u>
_____ Flexible Certificate	None	\$ _____
_____ One Year Certificate	\$5,000.00	\$ _____
_____ Two Year Certificate	\$5,000.00	\$ _____
_____ Five Year Certificate	\$5,000.00	\$ _____
_____ Please distribute \$ _____ of the matured certificate directly to me at my address of record.		

Interest rates may change at any time – call or visit our website for current rates! The Foundation may change the current interest rate payable on Flexible Certificates upon 30 days' prior written notice to the holders of such Certificates. The Foundation may also change the rate of interest on the Term Certificates to be sold in the future at anytime.

3. Preferred Method of Interest Payments

- _____ Add the interest to my certificate principal.
 _____ Please send me the quarterly interest payments. (Interest will be paid within approximately 15 days after each quarterly period following the purchase date.)
 _____ Please send me monthly interest payments.

If no option is checked, interest will be retained and added to principal.

4. Current Beneficiary Designation (Required-If "None on file", complete section 7 on page 2)

 Name of Beneficiary / (Successor Custodian if UTMA) Social Security Number _____

 Address of Beneficiary / Successor Custodian if UTMA)

 Name of Beneficiary Social Security Number _____

 Address of Beneficiary

5. Acknowledgement of Offering Circular Receipt (Required)

I hereby acknowledge receipt of the Foundation's Offering Circular dated April 30, 2011, relating to the Fund. Other than as stated on this application, all the representations and information on my original application (ownership of the certificate, beneficiary designation, if any, and contact information), remains the same. **If there is any change to the information on my original investment application, I have noted it on the following page.**

Signature _____ Signature _____
 Date _____ Date _____

The certificates are neither bank deposits nor bank obligations and are not insured by FDIC, SIPC, or any other state or federally regulated institution.

**FOR ADDITIONAL INFORMATION, PLEASE CONTACT THE FREE METHODIST FOUNDATION AT:
 P.O. Box 580 • Spring Arbor, Michigan 49283 • (800) 325-8975 • www.fmlf.org**

**USE THIS PAGE ONLY TO MAKE CHANGES IN THE INFORMATION
YOU SUPPLIED WITH YOUR ORIGINAL INVESTMENT APPLICATION.**

6. Change Certificate Ownership

Change certificate ownership to the Investor(s) identified below:

Sole Owner Joint Owner Formal Trust Minor Transfer Acct (UTMA)

Name of Primary Owner (Please include title, e.g., Mr., Mrs., Dr., Social Security Number Birthdate (if applicable)
Rev., etc.; if a trust, state the name and date of the trust; if an UTMA. or Tax I.D. Number
account, the name of the Minor)

Name of Secondary Owner or UTMA Custodian Social Security Number Birthdate (if applicable)
or Tax I.D. Number

Sole Ownership - If the Certificate is to be registered only in the name of one person, please give us the name and address of your nearest relative who does not live with you. This person will be contacted only should we be unable to locate you. (Print name and address of nearest relative) _____

Joint Ownership - Registration of the Certificate in the names of two individuals results in ownership of the Certificate in "joint tenancy with right of survivorship." Interest will be reported to Internal Revenue Service using the social security number of the first named person unless otherwise directed. **If the certificate will be owned by more than one person and you wish to require all owners to sign to redeem funds from the Certificate, please check here.**

Formal Trust - Interest will be payable only to the Trustee. *A copy of the trust agreement or a Certificate of Trust must be provided to the Foundation prior to opening a certificate.*

Minor Transfer Acct - We will issue the Certificate to you as the Custodian for the benefit of the Minor identified above under the Michigan Uniform Transfers to Minors Act (UTMA). This election is irrevocable and the Certificate will become the unrestricted property of the Minor when the Minor reaches the age of 18. If you desire to designate a successor custodian should the named Minor remain under 18 years of age after your death, please provide the below information for your designee. You may change or revoke the successor custodian designation by written notice to us.

7. Change or Add Beneficiary Information

Change or Add Beneficiary - We require that you specify the name of a person(s) or organization to receive the balance of the investment remaining at the time of your death, or on the death of the last of you to die if this is a jointly owned Certificate, or your successor custodian if this is a Minor Transfer Act account and the Minor is under 18 years of age. If you do not specify any beneficiary, the investment will be payable to your estate (or trustee if owned by a trust) and may be subject to probate.

Name of Beneficiary / (Successor Custodian if UTMA) Social Security Number or Tax I.D. Number

Address of Beneficiary / (Successor Custodian if UTMA)

Name of Beneficiary Social Security Number or Tax I.D. Number

Address of Beneficiary

8. Change Contact Information

Change contact information for primary certificate holder:

Name _____

Mailing Address _____

City _____ State _____ Zip _____

Home Telephone () _____ Business Telephone () _____

E-Mail Address (optional) _____

Name of Church (optional) _____ Conference(optional) _____