

# PURCHASE APPLICATION AND AGREEMENT



**CHURCH INVESTORS FUND**  
9401 E Stockton Blvd, Suite 240  
Elk Grove, CA 95624  
www.churchinvestorsfund.org

**1A: TYPE OF OWNERSHIP:** Joint owners are considered as joint tenants with rights of survivorship and not as tenants in common. Church Investors Fund reports interest to the Internal Revenue Service using the primary owner's Social Security Number.

- Individual     Joint     Trust/Organization

## 1B: OWNER:

Primary Applicant's Name (First, M.I., Last or Name of Applying Institution)      SSN (Or applicable Taxpayer Identification Number)      Date of Birth: mo / day / year

Street Address/Rural Route/P.O. Box      City, State, Zip      E-mail Address

Daytime Phone      Evening Phone      Mobile Phone

## 1C: CO-OWNER:

Name (First, M.I., Last or Name of Applying Institution)      SSN (Or applicable Taxpayer Identification Number)      Date of Birth: mo / day / year

Street Address/Rural Route/P.O. Box      City, State, Zip      E-mail Address

Relationship to Owner      Daytime Phone      Evening Phone

*- Please include an attachment if there will be more than one co-owner -*

## 2: CHURCH AFFILIATION:

Church Name      City, State

**3: INVESTMENT TYPE AND TERMS:** Insert the dollar amount you would like to invest next to the type of Certificate you wish to purchase. Please complete a separate Purchase Application and Agreement for each Certificate you purchase. See the Offering Circular for specific descriptions of available Certificates.

\$  FOUNDATION CERTIFICATE - \$250 minimum  
Not available in Louisiana or South Carolina

\$  TERM CERTIFICATE - \$1,000 minimum  
 1 yr     2 yr     3 yr     4 yr     5 yr  
 Other Term (for Special Certificates \_\_\_\_\_ months)

\$  BUILDING FUND CERTIFICATE (for churches only) - \$1,000 minimum  
Not available in Louisiana or South Carolina

REVOCABLE GIFT CERTIFICATE - \$1,000 minimum

1 yr     2 yr     3 yr     4 yr     5 yr

6 yr (available only if you select Church Investors Fund as beneficiary)

Name of Beneficiary Church or Organization

Address of Beneficiary

City, State, Zip

**TOTAL INVESTMENT: \$**

***Make check payable to "Church Investors Fund" or choose "Electronic Funds Transfer" in Part 5 and provide the necessary information.***

**4: DISTRIBUTION OF INTEREST:** Indicate how often you would like to receive interest payments on your Certificate. Please mark only one box. Interest compounds daily on all Certificates. All interest earned and not paid to you will be added to the principal amount of your Certificate monthly for Foundation Certificates and annually for all other Certificates.

**Let my interest accumulate and compound in my investment**

Pay to me by electronic transfer:     **Annually**     **Semi-annually**     **Quarterly** (\$5,000 minimum investment)     **Monthly** (\$50,000 minimum investment)

## 5: ELECTRONIC FUNDS TRANSFER:

By checking this box, I authorize Church Investors Fund to process any specific request for electronic transfers, including interest payments, to and/or from my bank or credit union account. I have attached a voided check from my desired transfer account.

**Recurring Transfers:** By checking this box, I authorize a withdrawal of \$ \_\_\_\_\_ on the \_\_\_\_ day of each month from my bank account to be added to my Foundation Certificate.

**6: BENEFICIARY DESIGNATION UPON DEATH:** (Please attach a separate sheet for additional Beneficiaries and information)

My estate       Church Investors Fund       The following individual / institution

Name \_\_\_\_\_ Relationship \_\_\_\_\_ SSN (Or applicable Taxpayer Identification Number) \_\_\_\_\_ Phone \_\_\_\_\_

Street Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_ **X**

*This election will remain in place unless changed in writing*

Signature

**7: INVESTMENTS HELD IN TRUST ONLY:**

If this investment is being held in a living trust, please provide information below and attach a copy of trust cover page, successor trustee provisions and trust signature page.

Name and Date of Trust \_\_\_\_\_ Tax Identification Number \_\_\_\_\_

**8: ACKNOWLEDGEMENT:**

1) The offer and sale of Church Investors Fund securities ("Certificates") are subject to the terms and conditions of the Church Investors Fund Offering Circular, dated April 30, 2019, as may be supplemented, amended and restated ("Offering Circular"), which is incorporated herein in full by this reference. Church Investors Fund reserves the right to refuse your application and not offer to sell any Certificate to you for any reason.

2) You agree to purchase the Certificate indicated by the information you have provided in this Purchase Application and Agreement. (Pennsylvania residents who purchase Certificates have the right to withdraw from the purchase pursuant to Section 207(m) of the Pennsylvania Securities Act of 1972. Please see page iv of Offering Circular for additional details.)

3) Each person signing below declares under penalty of perjury that such person(s): 1) meets the definition of "Limited Class of Investors" set forth in the Church Investors Fund Offering Circular, 2) has reviewed the Offering Circular dated April 30, 2019 and the Church Investors Fund financial statements included in it. You also had the opportunity to ask questions and receive answers about the Church Investors Fund Offering Circular and financial statements, the risks of investing in a Certificate, and the terms of the Certificate you are applying for; and 3) agrees to the terms and conditions described in the Offering Circular. Furthermore, each person signing below acknowledges that their signature(s), as signed below, will be used for identity verification purposes when requesting investment activities.

4) This application serves as a Substitute W-9 Form. Church Investors Fund is required to obtain your correct Social Security Number (SSN) in order to report to the Internal Revenue Service (IRS) interest paid to you. Church Investors Fund, like any of other payer of interest or dividends, must withhold and pay to the IRS a percentage of the interest paid to you if you fail to furnish Church Investors Fund with the correct SSN or if you fail to sign the acknowledgement at the bottom of this Purchase Application. This is referred to as "backup withholding." For more information on backup withholding, visit www.IRS.gov.

5) **Beneficiary Designation and Spousal Consent.** If you have selected a Revocable Gift Certificate, you request that Church Investors Fund designate the church or organization listed in Part 3 as beneficiary to receive the principal and any unpaid accrued interest on your Certificate at your death. You may change or revoke this beneficiary designation at any time. The terms of this beneficiary designation, your Revocable Gift Certificate and this Purchase Application and Agreement shall be binding on your heirs, beneficiaries and legal representatives. **In addition, you represent either (i) that you are unmarried, or (ii) that your spouse has signed either this Purchase Application and Agreement as a Joint Applicant, OR spouse has signed below, giving to the Primary Applicant any interest they have in the funds to be invested in the Certificate applied for in this Purchase Application and Agreement and agrees to the naming of the beneficiary in Part 3.** The spouse also acknowledges that they have received a fair and reasonable disclosure of the Primary Applicant's property and financial obligations. The spouse acknowledges that they shall have no claim against Church Investors Fund or the beneficiary identified in Part 3 of this Purchase Application and Agreement for any payment made to the beneficiary.

6) **Liability of Joint Applicants.** The undersigned Applicant and each Joint Applicant shall be jointly and severally liable under this Purchase Application and Agreement. **Church Investors Fund is authorized to act upon the instructions and directions of any Applicant in all matters,** including redemption requests by check or otherwise. In addition, if the Applicants have selected a Revocable Gift Certificate, each Applicant represents that the only other Applicant is his or her spouse.

7) *By signing this Purchase Application and Agreement and under penalties of perjury, each of you certify that:* 1) the Social Security or Taxpayer Identification Number you list under your name in Part 1B of this Purchase Application and Agreement is correct; and 2) You are not subject to backup withholding because: (a) You are exempt from backup withholding, or (b) The Internal Revenue Service has not notified you that part of your dividend and interest is to be withheld as a result of your failure to report all dividend and interest income, or (c) the IRS has notified you that you are no longer subject to backup withholding. **NOTE: You must cross out this paragraph if you ARE subject to backup withholding.**

Signatures required for transactions:  1 or  each applicant, if this is a joint account or  2, if this is a Revocable Gift

I/WE AUTHORIZE TELEPHONE TRANSFERS ON MY/OUR ACCOUNT(S)\*

**X**  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**X**  
Signature \_\_\_\_\_ Date \_\_\_\_\_

**The purchase of Certificates is subject to risks which are described in the Offering Circular. Offers to sell and solicitation of offers to buy Certificates are made only pursuant to the Offering Circular and only in those states where the Certificates may lawfully be offered or sold. The Certificates are not FDIC or SIPC insured nor are they bank deposits.**

*Investment rates are established according to policies set forth in the Offering Circular and are subject to change.*

*For a complete listing of current investment rates call (800) 543-2343 or visit www.ChurchInvestorsFund.org.*

*\*Authorization for telephone transfers gives Church Investors Fund, Inc. the rights to transact business with their investors where a written request may have been required.*

**QUESTIONS? call (800) 543-2343**

<i>For Office Use Only</i>			
Base #:	Investment #:	Coordinator:	Date Rcvd:
<input type="checkbox"/> PL	<input type="checkbox"/> IF	_____	_____