



APPLICATION FOR CERTIFICATE OF PARTICIPATION INVESTMENT FOR TRUST

Please complete the following application to purchase a Certificate of Participation. Please include a copy of the first page and the signature page(s) of the revocable trust agreement, and a copy of the portion of the trust agreement that names the successor trustee of the revocable trust. If there have been amendments to the original trust agreement that affect the selection of the successor trustee of the revocable trust, please provide copies of those amending documents.

The minimum investment for a Certificate of Participation is \$1,000.00.

Please make your check payable to:

Kansas Methodist Foundation
100 East First Ave., P.O. Box 605,
Hutchinson, Kansas 67504-0605

NAME OF OWNER(S): (Please print)

TRUSTEES \_\_\_\_\_

TITLE AND DATE OF TRUST INSTRUMENT \_\_\_\_\_

NAME 1 \_\_\_\_\_

NAME 2 \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY \_\_\_\_\_ STATE \_\_\_\_\_ ZIP \_\_\_\_\_

PHONE \_\_\_\_\_ TRUST TAX ID # \_\_\_\_\_

BIRTHDATE 1 \_\_\_\_\_ BIRTHDATE 2 \_\_\_\_\_

EMAIL \_\_\_\_\_

By providing your email address, you agree to receive annual account statements by email.

CHURCH NAME \_\_\_\_\_

MATURITY TERM: (Please check one) [ ] 12 Months [ ] 24 Months

INITIAL CERTIFICATE AMOUNT \$ \_\_\_\_\_

INTEREST PAYMENT: Please check whether interest is paid or reinvested.

[ ] Interest to be paid to owner [ ] semi-annually or [ ] quarterly (Please check one)

Interest can be paid by check or through direct deposit. For direct deposit, please include your bank name, routing number and account number and/or attach a voided check.

Bank Name \_\_\_\_\_

Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

[ ] Checking Account [ ] Savings Account

[ ] Interest to be reinvested automatically semi-annually and added to Certificate.

**EARLY WITHDRAWAL PENALTY:** Except as provided below, principal may not be withdrawn from this account before the maturity date (including any renewal thereof) without the consent of the Foundation, and a penalty may be charged for such early withdrawal. The penalty is three (3) months interest on the current principal balance not interest on the amount withdrawn. The penalty will be charged first against any interest in the account and then from the principal.

Unless an exception to the reporting requirement applies, the Foundation will report annually (or more frequently if required) to the primary owner of record of the Certificates and to the Internal Revenue Service with respect to the interest paid or credited to such primary owner of the Certificates.

The trustee(s) named above (collectively the "Trustee") hereby makes application on behalf of the Trust for investment in the amount indicated above in the Certificates offered by Kansas Area United Methodist Foundation, Inc. EIN 48-0697195, known as the Kansas Methodist Foundation ("Foundation") to be applied toward investment in the Master Certificate of Participation as described in the Foundation's Offering Circular dated April 30, 2023 ("Offering Circular").

The Trustee certifies that a copy of the Offering Circular has been received. The Trustee further certifies that (i) the Trustee is the trustee of the Trust; (ii) the Trustee has full power and authority to make this investment on behalf of the Trust; (iii) the Trustee is acquiring the Certificates on behalf of the Trust as an investment and not with the intent of transferring the Certificates; (iv) the Trust was not organized or created for the purpose of purchasing Certificates; and (v) the Trustee and/or the beneficiaries, is a congregant of a United Methodist Church or church within the Methodist movement as described in the Offering Circular. The Trustee understands and agrees that the Trust's investment in Certificates will be held, governed and administered by the Foundation under the terms of the Offering Circular. The Trustee further certifies that the Trustee is a bona fide resident of the State of Kansas, that each current beneficiary of the Trust is a resident of the State of Kansas and that the instrument creating the trust is governed by Kansas law. Each rollover of an investment will constitute the Trustee's certification that the foregoing certification remains true at the time of such rollover. If the Trustee moves out of the state of Kansas, the certificate will have to be redeemed at the next maturity date.

**On August 5, 1983, Congress repealed the law that would provide for withholding 10% of all interest payments made to individuals. At the same time, it adopted a new provision called "Backup Withholding". This became effective January 1, 1984 and will require the Portfolio to withhold 24% of your interest payments unless we have been furnished a correct Social Security or Tax Identification Number. To avoid this, please include your Social Security Number or Tax Identification Number and sign the following IRS Certification.**

Under penalties of perjury, by signing below, Trustee certifies that the number shown on this form is the correct Tax Identification Number for the Trust. Trustee further certifies that the Trust is not now subject to Backup Withholding either: (a) because the IRS has not notified the Trust that the trust is, or (b) the IRS has notified the Trust that it is no longer subject to Backup Withholding.

Trustee represents to the Foundation that: (i) none of the Trust, the Trustee or any beneficiary of the Trust has been designated by any agency or branch of the United States Government as a person or entity with whom persons and entities are prohibited from entering into transactions by the applicable laws and regulations of the United States (e.g. a member, sponsor or supporter of a terrorist organization) and (ii) without limitation of the foregoing, none of the Trust, the Trustee or any beneficiary of the Trust has been designated a "Specially Designated National" by the United States Office of Foreign Assets Control of the United States Department of Treasury.

**YES**, I have agreed to and accept the terms of the Foundation's Offering Circular dated April 30, 2023.

**YES**, We/I agree to be listed in the Foundation's Annual Report and publications.

\_\_\_\_\_  
Trustee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Trustee Signature

\_\_\_\_\_  
Date