



Lutheran Church Extension Fund

> where investments build ministry

GOLD TIER

Business Investment Application

Lutheran Church Extension Fund

PO Box 229009

St. Louis, MO 63122-9009

800-843-5233 • Fax: 314-996-1131

lcef.org



For the first Lutheran Church Extension Fund (LCEF) investment, either a Corporate Resolution or Partnership Authorization is required. These forms are available at lcef.org.

STEP 1: Officer/Partner Authorization

To be completed by two authorized elected officers/partners.

We _____ and _____ of
Officer Name/Partner Name Title Officer Name/Partner Name Title

_____ hereby certify that:
Business/Organization Name, City, State

- A. The Business is duly organized and existing under the laws of the state of its domicile and that as such has authorized me to make this certification on its behalf.
B. Each of the signers listed in STEP 4-Authorized Signers has been duly authorized and empowered to act on behalf of the Business by having investment and redemption privileges, including check writing and an optional Visa® Debit Card for StewardAccount®.

Signature Authorization

Check one: If unmarked, it will be assumed that only one signature is required.

___ Any one of the signatures in STEP 4 is required as authorization in all transactions.

___ Any two of the signatures in STEP 4 are required as authorization in all transactions.

Visa® Debit Card

Debit Cards are available on StewardAccounts which require only one signature on transactions. Check the Issue a Debit Card option in STEP 4 and a card will be issued in the name of the Business for the authorized signer (separate card for each signer).

MyAccount

• Signers who are not currently MyAccount users must complete a Business/Organization MyAccount application to request online access to the Business' investment accounts.

• MyAccount online services for investments requiring two signatures will be limited to "inquiry-only" access.

IMPORTANT INFORMATION—please read: In reference to StewardAccounts, if the Business requires two signatures or other special signing provisions, I agree that such a provision is solely for the Business' internal control purposes. The Business agrees that LCEF is not liable for paying an item that is lacking the required number of signatures.

- C. The Business is duly organized and existing under the laws of the state of its domicile and that as such has authorized me to make this certification on its behalf.

X
Officer/Partner Signature Date

X
Officer/Partner Signature Date

STEP 2: Select Type of Investment

Gold Tier StewardAccount® (Minimum \$50,000).....\$ _____

FOR LCEF USE ONLY:

ACCT # _____
Proc _____ Dt _____ Ver _____ Dt _____

STEP 3: Investment Registration

Please print.

Name of Business Entity: _____ Employer Identification Number: _____

If applicable, specify subtitle: _____ Email address: _____

Street Address of Business Entity: _____

City, State, ZIP: _____

Mailing Address for Business Entity: _____

City State, ZIP: _____

Telephone: _____ Fax: _____

Your Member Congregation: _____ City, State: _____

STEP 4: Authorized Signers "I" refers to all applicants, whether one or more.

- Debit cards are available only on StewardAccounts with no multiple-signer restrictions.
- Signers who are not currently *MyAccount* users must complete a Business/Organization *MyAccount* Application to request online access to the Business' investment accounts.
- *MyAccount* online services for investments with multiple-signer restrictions will be limited to "inquiry-only" access.

By signing this application, I agree to the certification statements listed in STEP 6—*Investment Certification*.

Name (please print) Title

Street Address

City, State, ZIP

Social Security Number Date of Birth Email Address

Home Phone Work Phone Mother's Maiden Name

Signature X _____

Issue a Debit Card Add to *MyAccount* (current users only)

Name (please print) Title

Street Address

City, State, ZIP

Social Security Number Date of Birth Email Address

Home Phone Work Phone Mother's Maiden Name

Signature X _____

Issue a Debit Card Add to *MyAccount* (current users only)

Name (please print) Title

Street Address

City, State, ZIP

Social Security Number Date of Birth Email Address

Home Phone Work Phone Mother's Maiden Name

Signature X _____

Issue a Debit Card Add to *MyAccount* (current users only)

Name (please print) Title

Street Address

City, State, ZIP

Social Security Number Date of Birth Email Address

Home Phone Work Phone Mother's Maiden Name

Signature X _____

Issue a Debit Card Add to *MyAccount* (current users only)

SIGN/DATE

SIGN/DATE

SIGN/DATE

SIGN/DATE

STEP 5: Interest Payment and Electronic Investment

Interest Payment Options

Please check one method of interest payment:

- Let interest accumulate in this investment.
- Transfer interest monthly to our existing LCEF investment or StewardAccount # _____.
- Transfer interest monthly to our external financial institution as described below (**void check required**).

Electronic Investment

(Fixed-rate term notes do not accept deposits.)

The Business authorizes LCEF to initiate withdrawals in the amount of \$ _____ from our external checking account for credit to our new LCEF investment (**void check required**).

Monthly frequency: 1st & 15th Once a month (indicate date): _____

ATTACH VOID CHECK HERE.

STEP 6: Investment Certification

"I" refers to all applicants, whether one or more.

By signing this application in STEP 4, I certify that:

General Provisions

- I am an authorized signer for the business entity specified in STEP 3, and I have received a current **Offering Circular** of The Lutheran Church Extension Fund–Missouri Synod.
- At the date of this application, all information on the Resolution or Authorization signed in connection with this application or previously signed with an original application is true and correct. Unless otherwise prohibited by a state, by signing this application, I consent and "opt-in" to automatic renewals of my investments as more particularly described in the Maturities section of the Offering Circular. For Pennsylvania business entities only: By signing this application, I acknowledge that I was advised of the right of withdrawal described in the Offering Circular.
- All information provided on this application is true and correct.
- The Business authorizes LCEF to initiate any correcting debit or credit that may be necessary.
- I acknowledge and agree to the Fee Schedule available at lcef.org/resources.

StewardAccount Provisions

- The Business understands and agrees to the terms and conditions of the Check-Writing Agreement, and if selected, the Visa Debit Card Agreement, both of which are described at lcef.org/agreements.
- The Business authorizes LCEF to accept any redemption check order signed by any single authorized signer.
- If the Visa Debit Card is selected on this application, the Business authorizes LCEF to accept such order of redemption.

Interest Payment/Electronic Investment Provisions

- The Interest Payment and Electronic Investment options selected on this application will remain in effect until revoked in writing. I acknowledge that the origination of automated clearinghouse (ACH) transactions to the Business' investment must comply with the provisions of U.S. law.

MyAccount Provisions

- The Business authorizes LCEF to accept all transaction requests initiated on the Business' behalf through the MyAccount service.
- The Business understands that the Business must notify LCEF immediately if any of the signers are no longer authorized by the Business to act on its behalf.

Under penalties of perjury, I certify:

1. The Employer Identification Number in STEP 3 and the Social Security numbers of all individuals provided in STEP 4 are correct.
2. The business entity is not subject to backup withholding because (a) it is exempt from backup withholding, (b) it has not been notified by the Internal Revenue Service (IRS) that it is subject to backup withholding as a result of a failure to report all interest or dividends (please draw an "X" through this paragraph if this business entity is subject to backup withholding), or (c) it has been notified by the IRS that it is no longer subject to backup withholding.
3. The business is a U.S. entity.

Note: Due to Internal Revenue Service regulations, LCEF cannot accept this investment until your Employer Identification Number in STEP 3 is provided and the authorization in STEP 4 is signed. The IRS does not require your consent to any provisions of this application other than the certifications required to avoid backup withholding.

