



**THE UNITED METHODIST FOUNDATION
of the Texas Annual Conference**

5215 Main Street
Houston, TX 77002

Phone: 713-533-3780 * Fax: 713-533-3781

PORTFOLIO SELECTION FORM

This is an addendum to the following Investment Agreement:

Name: <i>(Donor / Church / Agency)</i>	
Address:	
City / State / Zip Code:	
Phone Number:	
Fund Name:	
Account #:	

Investment Portfolio Option

Please mark with an "X" the investment portfolio in which the Fund is to be invested:

Money Market Portfolio <i>(100% in Money Market Funds)</i>	
Endowment Portfolio	
Diversified – Conservative Portfolio	
Diversified - Moderate Portfolio	
Diversified – Aggressive Portfolio	
Guaranteed Portfolio <i>(97% in Guaranteed Pool, 3% in Money Market)</i>	
Equity Portfolio	
Customized Portfolio / Other <i>(For customized portfolio, attach Portfolio Selection Form – Custom Portfolio)</i>	

(For customized portfolio, contact Barry Morris at 713-533-3780 or 800-521-9617)

Authorized Signature: _____

Date: _____

Printed Name & Title: _____