



# Investment Application

## Baptist General Conference *Cornerstone Fund*

2002 S. Arlington Heights Road, Arlington Heights, IL 60005

1.800.323.4215 • csfund@baptistgeneral.org • www.bgccornerstonefund.org

Office Use Only	
Received	
Check #	
Amount \$	
Customer #	

**TYPE OF OWNERSHIP** - select one type of ownership and complete the appropriate lines

**Individual** (line A)     
 **Organization\*\*** (line A)     
 **Trust** (line A)  
 **Joint\*** (lines A and B)     
 **Minor with Custodian** (lines A and B)

A. \_\_\_\_\_  
Owner/Minor Name                      Social Security Number/EIN                      Date of Birth                      Driver's License #/State

B. \_\_\_\_\_  
Owner/Custodian Name                      Social Security Number/EIN                      Date of Birth                      Driver's License #/State

**Contact Information**

\_\_\_\_\_  
Street    City    State    Zip

\_\_\_\_\_  
Telephone Number    Email Address

Check if more than one signature is required for transactions on this certificate.

Check if you are subject to backup withholding.

\* Joint owners are considered as joint tenants with rights of survivorship and not as tenants in common. Interest is reported to the Internal Revenue Service using the social security number of the first named person.

\*\* Corporate investors must include the following back-up documentation:  
Corporate Resolution  
Authorized Signature Record

**INVESTMENT OPTIONS**

	Investment Amount
Demand Certificate (\$100 minimum).....	_____
Church Savings Certificate (\$5000 minimum - available to churches, districts, and affiliated ministries)...	_____
Term Certificate: <input type="checkbox"/> 6-month (\$100 minimum).....	_____
<input type="checkbox"/> 1-year (\$100 minimum).....	_____
<input type="checkbox"/> 2-year (\$100 minimum).....	_____
<input type="checkbox"/> 3-year (\$100 minimum).....	_____
<input type="checkbox"/> 4-year (\$100 minimum).....	_____
<input type="checkbox"/> 5-year (\$100 minimum).....	_____

You can add to your Demand or Church Savings Certificate with minimum additional investments of \$25.

**INTEREST PAYMENT** (select one)

Compound semi-annually

Payment to owner by check (select one)  
\_\_\_\_ monthly      \_\_\_\_ quarterly      \_\_\_\_ semi-annually      \_\_\_\_ annually  
- 6-month Certificate only pays interest monthly or at maturity.

Electronic transfer to my bank account (select one)  
- Please attach a completed bank authorization form and a voided check.  
\_\_\_\_ monthly      \_\_\_\_ quarterly      \_\_\_\_ semi-annually      \_\_\_\_ annually  
- 6-month Certificate only pays interest monthly or at maturity.

## SIGNATURE AND TAXPAYER IDENTIFICATION NUMBER CERTIFICATION

I hereby acknowledge receipt of the Offering Circular dated March 1, 2008, of the Baptist General Conference Cornerstone Fund. I represent that I am 18 years of age or older. I further represent that I am a member of, contributor to, or participant in the Baptist General Conference, including any program, activity, or organization which constitutes a part of the Baptist General Conference, or an ancestor, descendant, or successor in interest to such person. I understand that the certificate(s) I currently hold has been purchased for my own account and that in the event I hold more than one certificate, that this statement applies to all such certificates.

**Certification** - Under the penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding.

\_\_\_\_\_  
Signature of Principal Certificate Owner or Trustee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Joint Owner or Custodian

\_\_\_\_\_  
Date

**Certification Instructions** - If you have been notified by the IRS that you are currently subject to backup withholding because of underreporting interest or dividends on your tax return, you must cross out item (2) above.

**Note:** Due to the IRS regulations, the Fund cannot issue your certificate until your taxpayer identification number is provided and the above certification signed.

## BENEFICIARY INFORMATION

List the person or organization to which you want to transfer the balance of your Certificate upon the death of the last surviving owner. If you would like the investment amount to be distributed to more than one person or organization, you will need to complete a separate form.

\_\_\_\_\_  
Name (Individual or Organization)

\_\_\_\_\_  
Social Security Number/EIN

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Telephone Number

## SPOUSAL CONSENT (AZ, CA, NM, TX, WA, and WI residents only)

If you are married, reside in a community property state (listed above) and designate someone other than your spouse as your sole primary beneficiary, your spouse must sign below.

I am the spouse of the Certificate owner stated above. I give the owner any interest I have in the Certificate. Therefore, I agree to my spouse's naming of a primary beneficiary other than myself. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. I also acknowledge that I shall have no claim whatsoever against the BGC Cornerstone Fund for any payment to my spouse's named beneficiary(ies).

\_\_\_\_\_  
Signature of Certificate Owner's Spouse

\_\_\_\_\_  
Date

\_\_\_\_\_  
Spouse of

## CHURCH ATTENDING

\_\_\_\_\_  
Church Name

\_\_\_\_\_  
City

\_\_\_\_\_  
State

## HOW DID YOU HEAR ABOUT THE BGC CORNERSTONE FUND?

Please check as many as may apply:

- I am a current investor       Bulletin inserts       *BGC World* magazine       Individual referral  
 Website       Presentation in my church       BGC sponsored event       Other \_\_\_\_\_