



FUND MANAGEMENT AGREEMENT
Selection Certificate

Client Name: \_\_\_\_\_

Account Name: \_\_\_\_\_

Agreement Date: \_\_\_\_\_

Please indicate in the blanks below the amount of the dollars from the account listed above that are to be deposited in the investment option selected, as well as how to distribute the income.

INVESTMENT OPTIONS

INCOME DISTRIBUTIONS

- \$ \_\_\_\_\_ DAILY SAVINGS ACCOUNT
\$ \_\_\_\_\_ 1 MONTH CET INVESTMENT
\$ \_\_\_\_\_ 3 MONTH CET INVESTMENT
\$ \_\_\_\_\_ 6 MONTH CET INVESTMENT
\$ \_\_\_\_\_ 9 MONTH CET INVESTMENT
\$ \_\_\_\_\_ 1 YEAR CET INVESTMENT
\$ \_\_\_\_\_ 2 YEAR CET INVESTMENT
\$ \_\_\_\_\_ 3 YEAR CET INVESTMENT
\$ \_\_\_\_\_ 5 YEAR CET INVESTMENT
\$ \_\_\_\_\_ SBTF BALANCED FUND
\$ \_\_\_\_\_ SBTF DEFENSIVE STRATEGIES
\$ \_\_\_\_\_ SBTF ENDOWMENT FUND
\$ \_\_\_\_\_ SBTF ENHANCED CASH FUND
\$ \_\_\_\_\_ SBTF GROUP EQUITY FUND
\$ \_\_\_\_\_ SBTF GROUP INCOME FUND
\$ \_\_\_\_\_ SBTF GROWTH FUND
\$ \_\_\_\_\_ SBTF INCOME FUND
\$ \_\_\_\_\_ GUIDESTONE FUNDS
(Complete Supplemental GuideStone Form)
\$ \_\_\_\_\_ TOTAL DEPOSIT

- [ ] HOLD UNTIL REQUESTED
[ ] MONTHLY
[ ] QUARTERLY
[ ] ANNUALLY
[ ] RE-INVEST IN PRINCIPAL
[ ] CET ONLY - REINVEST AT MATURITY
[ ] CET ONLY - DISTRIBUTE AT MATURITY
[ ] OTHER \_\_\_\_\_

The above information is required to provide the SBTF with a clear understanding of the client's preference in (1) the allocation of the funds held within a SBTF Fund Management Agreement and (2) distribution of available income.

The funds within the agreement will be deposited into the investment options indicated on this certificate and are based upon the investment objectives, income needs, and time horizon determined by the ministry client. Church Expansion Term (CET) investment rate will be set at the rate for the month the deposit is received. Absent written directions or instructions from the ministry client to the Foundation, the default investment allocation will be to the Daily Savings Account.

Excluding the Daily Savings Account and Church Expansion Term Investments, (1) no part of this instrument is to be construed as a promise, guarantee, covenant or commitment by the SBTF to attain a particular rate of return or to avert a diminution in value of the assets entrusted to the SBTF. (2) All investments are subject to risk, past performance is not a guarantee of future results. (3) Investments and funds placed by clients with the SBTF are not insured against loss or guaranteed by the SBTF.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_



**SUPPLEMENTAL GUIDESTONE**

**Selection Certificate**

**(Complete only if selecting individual GuideStone Funds)**

**Client Name:** \_\_\_\_\_

**Account Name:** \_\_\_\_\_

**Account Agreement Date:** \_\_\_\_\_

The following information is required to provide the SBTF with a clear understanding of the client's preference in the allocation of funds from the account listed above into various GuideStone Funds available within a SBTF Fund Management Agreement.

**Asset Allocation Funds:**

- \$ \_\_\_\_\_ Conservative Allocation
- \$ \_\_\_\_\_ Balanced Allocation
- \$ \_\_\_\_\_ Growth Allocation
- \$ \_\_\_\_\_ Aggressive Allocation

**Select Funds**

- |                                   |                                      |
|-----------------------------------|--------------------------------------|
| \$ _____ Money Market             | \$ _____ Value Equity                |
| \$ _____ Low-Duration Bond        | \$ _____ Growth Equity               |
| \$ _____ Medium-Duration Bond     | \$ _____ Small Cap Equity            |
| \$ _____ Extended-Duration Bond   | \$ _____ International Equity        |
| \$ _____ Global Bond              | \$ _____ Emerging Markets            |
| \$ _____ Inflation Protected Bond | \$ _____ Defensive Market Strategies |
| \$ _____ Real Estate Securities   | \$ _____ International Equity Index  |
| \$ _____ Equity Index             |                                      |

This selection certificate confirms that a total amount of \$ \_\_\_\_\_ of the account listed above is to be invested according to the allotted amount for each individual GuideStone Fund selected above.

**GuideStone Investment Funds are not insured against loss or guaranteed by the SBTF, the FDIC or otherwise, and are independently governed by GuideStone Financial Services and not by the SBTF or its investment policies or guidelines. Clients who choose to invest in GuideStone Investment Funds must review GuideStone Financial Services' fund information, policies and guidelines located at [www.guidestone.org](http://www.guidestone.org).**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date