

APPLICATION FOR PARTICIPATION

CATHOLIC FOUNDATION FOR THE PEOPLE OF THE DIOCESE OF ROCKFORD

Name of Parish/Diocesan Agency: _____

Name of Pastor/Director _____

Address: _____ City/Zip: _____

Phone: (____) _____

NAME OF THE NEW ACCOUNT FOR THE CATHOLIC FOUNDATION:

STATEMENT OF NEW ACCOUNT'S PURPOSE (Attach separate sheet if necessary):

FUND SELECTION:

Determine which fund in which you would like to invest. Check one of the following and indicate the initial deposit amount (If you are investing more than \$50,000 you can split your investment into more than one fund).

____ **Growth Fund** \$ _____ Initial Deposit

- All stock portfolio
- Long-term growth potential
- Not intended for normal operating expenses
- Willing to accept risk and volatility of stock market

-or-

____ **Fixed Income Fund** \$ _____ Initial Deposit

- All bond portfolio
- Relatively stable source of current income
- Higher rates than CDs, Money Market Funds or T Bills
- Less willing to accept market risk

-or-

____ **Balanced Fund** \$ _____ Initial Deposit

- 70% of the Growth Fund; 30% of Income Fund
- Stock market growth potential blended with lower risk and volatility of the bonds
- Current income with growth potential

SIGNATURES: (Two required)

Pastor/Director

Representative of Financial Leadership

Date _____