



Investment Account Agreement

Reform Jewish Values Fund

Union for Reform Judaism Congregations

This form is used by URJ-affiliated congregations to open an investment account with the Reform Pension Board's (RPB) Reform Pension Plan (the Plan). Fill in by hand using black ink or on screen (PDF) and return to RPB according to the instructions in Section 6.

1. ACCOUNT INFORMATION

Congregation Name _____ Account Name _____

Employer Identification Number (EIN)/Taxpayer Identification Number (TIN) _____

Mailing Address _____

City _____ State/Province _____ Zip Code _____ Country _____

Primary Contact

Last Name _____ First Name _____ Title _____

Preferred Phone Number _____

Email address _____

2. INVESTMENT

Your congregation's money will be invested in the Plan's RJV Fund. The minimum investment is USD 18,000. Investments can be made by check, payable to the Reform Pension Board, or wire transfer. Please contact Alyce Gunn at agunn@rpb.org for the wire instructions. For additional information about the RJV Fund, please refer to rpb.org/invest.

Initial Investment Amount (USD) _____

3. FEES

The RJV Fund investment management fee is a blended rate based on the fund's total pool of assets: 15 bps for the first \$10 million in assets and 10 bps for assets over \$10 million. For example, if the fund's value is \$20 million, the annualized fee is 12.5 bps. There is also an RPB administrative fee of 27 bps.

4. ACCOUNT INFORMATION

RPB provides investors with access to account information and statements through InfoExpress, our recordkeeper's online portal. Your organization will receive one login to InfoExpress after we've processed your investment account agreement and check.

5. AUTHORIZED SIGNERS

Please type or print the name(s) and title(s) of the authorized signers for this account who are empowered to review account information and effect securities transactions for the congregation. You must also submit a Board Resolution, signed by the secretary of your board, that names the authorized signers. Should the authorized signers change, RPB will need a new Board Resolution from your congregation.

Name of Signatory 1 _____ Title _____

Signature _____ Date _____

Name of Signatory 2 _____ Title _____

Signature _____ Date _____



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6. CONGREGATION SIGNATURE

I acknowledge that our congregation (1) is affiliated with the Union for Reform Judaism (URJ), (2) agrees that the use of its investments will be devoted exclusively to its congregational purposes, (3) understands that the fees listed in this Agreement are subject to change, and (4) will notify the trustees should we become the subject of any insolvency proceedings. I further acknowledge that our congregation may contribute additional funds to our RPB account as long as we remain an active member of the URJ.

I have read, understand, and accept the terms of this Investment Account Agreement on behalf of our congregation.

Name _____ Title _____

Signature _____ Date _____

Congregation Name _____

Mail this Investment Account Agreement, your Board Resolution naming the authorized signers, and a check denominated in US dollars made payable to "Reform Pension Board" to:

Alyce Gunn
Chief Financial Officer
Reform Pension Board
355 Lexington Avenue
5th Floor
New York, NY 10017

Questions:

Call us at 212-681-1818

FOR ADMINISTRATIVE USE ONLY

Employer ID number _____

Participant ID number _____

Authorized Signature _____ Date _____