

# INSTITUTIONAL INVESTMENT APPLICATION

## INSTITUTION INFORMATION *(Please Print)*

Institution: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_  
EIN: \_\_\_\_\_ E-mail address: \_\_\_\_\_

FOR OFFICE USE ONLY  
Date Received \_\_\_\_\_  
Account # \_\_\_\_\_

## AUTHORIZED REPRESENTATIVES

The following representatives are authorized to make decisions on the institutional investment account and to request withdrawals on behalf of the institution. (If more than two, please attach a paper with full name, social security number, telephone, email and position)

- 1) Name: \_\_\_\_\_ SS#: \_\_\_\_\_  
Telephone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_  
Position: \_\_\_\_\_
- 2) Name: \_\_\_\_\_ SS#: \_\_\_\_\_  
Telephone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_  
Position: \_\_\_\_\_

## INVESTMENT SELECTION

You may invest in one or all investment options. Please indicate the percentage of your investment that you want invested in each option (must total 100%). If no choice is made, all funds will remain in the Default strategy.

### Investment Options

The Set Rate Fund*	_____ %	Large Cap Value	_____ %
The Moderate Strategy*	_____ %	SMID Cap	_____ %
The Default Strategy*	_____ %	Real Estate (REITs)	_____ %
The Maximum Strategy*	_____ %	Intermediate Fixed Income	_____ %
All Cap Growth Equity	_____ %	Short Term Fixed Income	_____ %
Large Cap Growth	_____ %		
		Total	_____ %

*\*Preset Allocations*

## CERTIFICATION

The institution requests that the Richland Ave Financial invest our accumulations/contributions based upon our investment choices above. The institution has reviewed the information provided by the Board of Retirement and has made this selection based upon our own investment judgment. The institution also realizes that past results are not a guarantee of future performance.

Print Name: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_ Date: \_\_\_\_\_

*You should consider the investment objectives, risks and charges and expenses carefully before investing. Past performance does not guarantee future results. The investment account provided by Richland Ave Financial is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. Neither the Board of Trustees nor the staff of Richland Ave Financial are engaged in rendering financial advice, legal advice, or other financial planning services. If such advice is desired or required, the services of a competent professional should be sought.*



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