



Investment Account Agreement

Reform Jewish Values Stock Fund

Union for Reform Judaism Congregation

This form is used by institutions affiliated with the Union for Reform Judaism in order to open an account with the Reform Pension Board (RPB) for the purposes of investing in the Reform Pension Plan's funds. 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 organization's money will be invested in the Plan's RJV Stock Fund. Review the enclosed Investment Choice Guide and fund fact sheet for details on the fund or visit www.rpb.org/rjv-fund.

Initial Investment Amount (USD)

To fund your account, you can make a wire transfer or send a check to RPB at the address below, made payable to the Reform Pension Board. For wire instructions, please contact Alyce Gunn at agunn@rpb.org.

Note: RPB reserves the right to terminate the RJV Stock Fund and investing in any fund is subject to investment risks, including possible loss of the principal amount invested. Redemptions will be payable exclusively from the assets of the RJV Stock Fund. Investments in the fund are not guaranteed by RPB or any other person or entity. A copy of RPB's Investment Policy Statement is available upon request. To the extent that this Investment Account Agreement conflicts with RPB's Investment Policy Statement, RPB's Investment Policy Statement supersedes this Investment Account Agreement.

3. FEES

Please refer to the enclosed fund fact sheet for information on the investment management fee for the RJV Stock Fund or visit www.rpb.org/rjv-fund. In addition to the fund's investment management fee, each account will be charged an annual administrative fee of approximately 22 basis points (0.22%) of the account balance. Note that RPB reserves the right to change the fees at any time in its sole discretion.

4. ACCOUNT INFORMATION

RPB provides investors with access to their accounts through Fidelity NetBenefits®, our recordkeeper's online portal. You can view your account information and download account statements. Your organization will receive one login (user ID) to NetBenefits after we've processed this agreement and deposited your money.

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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 institution. You must also submit a board resolution, signed by the secretary or other authorized individual of your board, that names the authorized signers. Should the authorized signers change, RPB will need a new board resolution from your institution.

Name of Signatory 1

Signature

Date

Name of Signatory 2

Signature

Date

6. INSTITUTION SIGNATURE

We acknowledge that (1) our organization is affiliated with the URJ, (2) our organization will devote the proceeds of our investments under the Reform Pension Plan exclusively to our institutional purposes, (3) the fees referred to in this Investment Account Agreement are subject to change, (4) our organization will notify RPB should we become the subject of insolvency proceedings, (5) our organization will abide by the terms of the Reform Pension Plan and Reform Pension Trust, (6) our organization may contribute additional funds to our RPB account as long as we remain an active member of the URJ, (7) individuals duly authorized by the organization's trustees or other fiduciaries with full power and authority to make investment decisions on behalf of the organization have received and reviewed the enclosed Investment Choice Guide and fund fact sheet, (8) our organization will not assign, encumber, or otherwise transfer any part of its interest in the selected investment fund, and (9) individuals duly authorized by the organization's trustees or other fiduciaries with full power and authority to make investment decisions on behalf of the organization have such knowledge and experience in financial and business matters that they are capable of evaluating the merits and risks of an investment in the selected funds and are capable of making an informed decision with respect to an investment in the RJV Stock Fund.

Name

Title

Signature

Date

Mailing Address

Congregation Name

Send this Investment Account Agreement and your board resolution naming the authorized signers to the secure **Box** link on our website at rpb.org/upload.

Questions:

Contact Alyce Gunn at agunn@rpb.org or (646) 884-9888