



Fiduciary Deposit Account Application

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Western Adventist Foundation is a Seventh-day Adventist
Trust Management Corporation (WAF)
MAILING ADDRESS: PO Box 15430, Scottsdale, AZ 85267
FEDEX: 13825 N Northsight Blvd. Bldg. A-201, Scottsdale, AZ 85260

Instructions: Please write carefully with a blue or black pen.

ACCOUNT FIDUCIARY

Identify the fiduciary for the account.

Name: _____

Address: _____ Email: _____

City: _____ State: _____ Zip: _____ Phone: _____

BENEFICIAL OWNER

Identify the beneficiary owner for the account.

The beneficial owner is:

Still Living Deceased A Trust or Estate The same as the Account Fiduciary

Name: _____

Address: _____ Email: _____

City: _____ State: _____ Zip: _____ Phone: _____

If the beneficial owner is a living person, please provide an SSN #: _____

If the beneficial owner is an estate, trust, or the fiduciary, please provide an EIN #: _____

AUTHORIZED INDIVIDUAL & PRIMARY CONTACT

Please provide the name and contact information of the individual assigned to this role, along with governing board Minutes, Corporate Resolution, copy of the Trust, or copy of the Will that establishes their appointment.

Name: _____ Title: _____

Email Address: _____ Phone: _____

How will the account be invested?:

Conservative Moderately Conservative Moderate Moderately Aggressive

The investment options referenced are WAF's Revocable Model Asset Allocations. See the latest Investment Review.

Will statements be mailed quarterly via USPS or will the account fiduciary login to our online portal?:

USPS Mail Enable Online Access

Will the TDA make payments or redeposit income back into the account?

Payments of income to the Beneficial Owner: Monthly Quarterly Semiannually Annually

Fixed payments of \$_____ Monthly Quarterly Semiannually Annually

Redeposited back into the account:

ACKNOWLEDGEMENT OF TERMS

Please review these terms carefully.

The authorized representatives of the organization named above hereby authorize Western Adventist Foundation (WAF) to establish and administer a deposit account for the benefit of the designated owner, in accordance with the instructions set forth herein and subject to applicable management fees.

WAF's role is limited to fund allocation, income and gain/loss tracking, preparation of quarterly reports, issuance of appropriate tax documentation, and the disbursement of funds back to the account's designated beneficial owner or the return of funds to the fiduciary.

The fiduciary, or a duly authorized agent as designated in the applicable legal documentation, shall retain the authority to modify any elections associated with the account, including the right to close the account and request the return of all funds.

Authorized Individual # 1 Signature

Authorized Individual # 2 Signature, if applicable

Date

If the account fiduciary is also the beneficial owner of the account, please provide a detailed explanation:

