BUILD A FUND ENROLLMENT AGREEMENT SAMPLE

I/We wish to establish a component fund within the Community Foundation of Greater New Britain, Inc., (the “Foundation”) through the “Build a Fund” program. I/We understand that all contributions and growth due to investments accumulate in the account I/we establish according to the terms set forth below and the Foundation’s policies on building a fund, which I have read. The Foundation will waive administrative fees until the “Funding Date”. I/We understand that the Foundation has the right to invest my/our contributions in such a manner as the Finance Committee of the Foundation, in its discretion, may determine.

I/We would like to build a ________________ fund, and once established it will be called the ___________________________________Fund.

I/We would like to build a fund through:

☐ a regular deposit plan at the rate of
  $____________ per month ($50 minimum)
  $____________ per quarter ($250 minimum)
  $____________ per year ($1,000 minimum)

☐ Other _______________________________________________________

My/Our contributions to this fund account at the Foundation shall be made as follows:

☐ Personal check
☐ Stock transfer
☐ Other _______________________________________________________

It is my/our intention to withhold distributions from the fund until:

☐ A total of $________ has been contributed
☐ The total value of the Account equals $__________
☐ ____________________________ (date)

Agency/Organization Authorized Representative

____________________________________________________________ Date__________

Authorized Foundation Signature _________________________________ Date __________