



STEP 1: Choose Your Investment Ownership Choose A or B (please print)

A. Sole or Joint Owners (Must be at least 18 years old. One or more owners with full rights of survivorship and not tenants in common. Interest is reported to the IRS using the Social Security number of the first owner listed).

1. _____
 Name _____ Social Security Number _____ Date of Birth _____
 Street, City, State, ZIP _____
 Telephone: Home Number _____ Cell/Work Number _____ * Email _____
2. _____
 Name _____ Social Security Number _____ Date of Birth _____
 Street, City, State, Zip _____
 Telephone: Home Number _____ Cell/Work Number _____ * Email _____

B. Trust/Estate (Trusts must send LCEF Trust Certification form, available at lcef.org or by calling LCEF).

 Name of Trust/Estate _____ Social Security/TIN _____
 Street, City, State, Zip _____
 Telephone: Home Number _____ Cell/Work Number _____ * Email _____

STEP 2: Select Type of Investment

Church Worker Loan Pool Term Note, Fixed Rate ____ 5 years ____ 8 years ____ 10 years.....\$_____

STEP 3: Signature (Must be signed by all owners).

By signing this application, I/we agree to the certification statements listed in STEP 6—Investment Certification.

 Signature of Primary Owner, Executor or Trustee _____ Date _____ Mother's Maiden Name _____

 Signature of Joint Owner, Executor or Trustee _____ Date _____ Mother's Maiden Name _____

***Electronic Delivery Agreement for LCEF's Offering Circular—(Please check the box.)**

☐ In lieu of receiving a mailed copy of the Offering Circular, I request LCEF to send to my household, via email, notification that the Offering Circular and Annual Report are available for review on LCEF's website. I understand I may revoke this request at any time or change the delivery address by contacting LCEF.

STEP 4: Member Congregation

Your Member Congregation _____

City _____

State _____

ATTACH VOID CHECK HERE

STEP 5: Interest Payment and Electronic Investment

Interest Payment Options

Please check one method of interest payment:

☐ Let interest accumulate in this investment.

☐ Transfer interest to my existing LCEF investment or StewardAccount # _____

☐ Transfer interest to my external financial institution (**void check required**).

☐ Send the interest monthly ☐ Send the interest quarterly (not available on StewardAccounts)

Electronic Investment

(All fixed-rate term notes, except ConnectPLUS and PartnerPLUS, do not accept deposits).

I authorize LCEF to initiate withdrawals in the amount of \$ _____ from our external checking account for credit to our new LCEF investment (**void check required**).

Monthly frequency: ☐ 1st & 15th ☐ Once a month (indicate date): _____

STEP 6: Investment Certification *"I" and "my" refers to all applicants, whether one or more.*

- I am of legal age and have received a current Offering Circular of the Lutheran Church Extension Fund—Missouri Synod.
- Prior to receipt of the Offering Circular, I was a member of, contributor to, or participant in The Lutheran Church—Missouri Synod or any district or other program, activity, or organization that constitutes a part of the Synod or any of its districts, or I was an ancestor, descendant, or successor in interest to such person. **Unless otherwise prohibited by a state, by signing this application, I consent and "opt-in" to automatic renewals of my investments as more particularly described in the Maturities section of the Offering Circular. For Pennsylvania residents only: By signing this application, I agree that I was advised of the right of withdrawal described in the Offering Circular.**
- All information provided is true and correct.
- I agree that the electronic feature(s) selected in STEP 5 will remain in effect until revoked in writing, and that the origination of automated clearinghouse (ACH) transactions to my investment must comply with the provisions of U.S. law.
- I authorize LCEF to initiate any correcting debit or credit that may be necessary.
- I agree that LCEF reserves the right to assess maintenance fees.
- **Exclusions: Dedicated Certificates and StewardAccount products are not available to investors in South Carolina. ConnectPLUS Term Note is not available to investors in Ohio and Pennsylvania.**

Under penalties of perjury, I certify:

1. The Social Security or Tax ID Number shown on this application is correct.
2. I am either exempt from withholding or otherwise not subject to backup withholding. The IRS has not notified me that part of my dividend and interest is to be withheld as a result of my failure to report all dividend and interest income. Please draw an "X" through this paragraph if you ARE subject to backup withholding.
3. I am a U.S. person (including a U.S. resident alien).

Note: Due to Internal Revenue Service regulations, LCEF cannot record your investment until your Taxpayer Identification Number is provided and the above certification signed. The IRS does not require your consent to any provisions of this application other than the certifications required to avoid backup withholding.



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