

**INVESTMENT AGREEMENT**

**Account #:** \_\_\_\_\_

**EIN:**

This Agreement is entered into by and between HEARTSPRING METHODIST FOUNDATION, located in Houston, Texas (the "Foundation"), and \_\_\_\_\_ located in \_\_\_\_\_, Texas (the "Agency"). The parties hereto agree as follows:

1. A. There is hereby re-created in the Foundation, the \_\_\_\_\_ (the "Fund"), which will be maintained by the Foundation for the benefit of the Agency.  
  
B. The initial deposit is \_\_\_\_\_, received on \_\_\_\_\_. Additional deposits to the Fund may be made at any time through marketable gifts of cash, stocks, bonds, or any other gift mutually acceptable to the Foundation and the Agency.
2. Earnings on the Fund are determined by the investment pool or pools utilized, maintained by the Foundation, according to the Fund Management Selection Form, incorporated as an addendum to this Agreement. The Foundation's Investment Policy Statement provides detailed information on each investment pool. A management fee may be deducted from the gross earnings of the Fund by the Foundation.
3. Income and market changes to the Fund, where applicable, will be posted to the account and a periodic statement, issued at least quarterly, will report that information.
4. A. Withdrawals of interest and/or principal will be made according to instructions outlined in the Fund Management Selection Form, incorporated as an addendum to this Agreement.  
  
B. Withdrawals may be authorized in writing by signature from the minimum number of required authorized signors as outlined in the Signature Authorization Card, incorporated as an addendum to this Agreement.
5. This Agreement may be amended at any time by agreement of the Foundation and the Agency in writing.

In witness thereof, the Foundation and Agency have executed this agreement effective as of \_\_\_\_\_, 2018.

HEARTSPRING METHODIST FOUNDATION  
Houston, Texas

\_\_\_\_\_  
*Agency Name*

By: \_\_\_\_\_  
Name: Dorena L. Moore  
Title: Chief Financial Officer  
Date: \_\_\_\_\_

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_  
Date: \_\_\_\_\_