

# Uniform Transfers to Minors Act

This investment is established as an irrevocable transfer of assets to a minor under the UTMA. The funds in this investment may only be used for the benefit of the minor indicated below. The custodian administers the note until the minor reaches the age of majority under Oregon state law. At the age of majority, the balance of the investment is payable to the minor.

## Minor's Information

Full Name	Social Security Number	Gender	Date of Birth
Mailing Address	City	State	ZIP
Physical Address (If different than above)	City	State	ZIP

## Age of Majority

Not less than 21 and no more than 25 years of age: \_\_\_\_\_

## Custodian Information

Prefix	Full Name	Social Security Number	Date of Birth
Gender	Daytime Phone	Relationship to Minor	
Email			
Mailing Address	City	State	ZIP
Physical Address (If different than above)	City	State	ZIP

## Successor Custodian

In the event of death, incapacity, or resignation of current custodian, the successor custodian will be responsible for notifying GenFi Ministries of the change of custodianship and may be asked to provide certain documentation.

Full Name	Date of Birth	Relationship to Minor
Daytime Phone	Email	

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## Investment Note Terms

Enter the dollar amount for the term(s) you would like to open. See our Rate Chart for current rates and information about each option. *Terms are irrevocable.*

Fixed Rate	Amount (\$250 minimum per investment*)
<input type="checkbox"/> 5 Year Term <sup>†</sup>	\$ _____
<input type="checkbox"/> 3 Year Term <sup>†</sup>	\$ _____
<input type="checkbox"/> 2 Year Term <sup>†</sup>	\$ _____
<input type="checkbox"/> 18 Month Term <sup>†</sup>	\$ _____
<input type="checkbox"/> 12 Month Term <sup>†</sup>	\$ _____
<input type="checkbox"/> 6 Month Term <sup>†</sup>	\$ _____
<b>Total Investment Amount</b>	\$ _____

<sup>†</sup> Investors should count on holding notes to maturity. Notes are not designed for early redemption. Early redemption, if allowed, may incur a penalty of up to 6 months' interest on note balance. Any redemption from this UTMA may only be used for the benefit of the minor.

- Included is a check for the above amount (make checks payable to GenFi Ministries)
- Included is a voided check. Please deduct the Total Investment Amount from the bank account provided

## Monthly Electronic Fund Transfer (EFT) Addition Options

Complete this section only if you wish to make regular monthly additions to your investment from your checking account. Restrictions on additions may apply in the future. If more than one term was chosen, please indicate which term will be receiving the addition.

- I want to make recurring monthly additions to my investment from my checking account. This authorization will remain in effect until I notify GenFi Ministries that I wish to end the recurring monthly additions, which I may do at any time upon at least 30 days notice. (Attach a voided check. Deposit slips not accepted.)

Amount to Transfer	Start Date (MM/DD/YYYY)	Term
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## Statement Frequency *(Choose only one)*

- Email (Monthly Only)
- Quarterly
- Semi-Annually
- Annually

## Additional Information

How did you hear about GenFi Ministries?

If referred, who told you about us?

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## Declaration of Custodian

By signing below I declare under penalties of perjury that I (a) have received and reviewed GenFi Ministries' current Offering Circular, including the financial statements included therein; (b) comes within the definition of the "limited class of investors" set forth in the Offering Circular; and (c) agrees to the terms and conditions described in the Offering Circular.

The custodian listed on page one certifies under penalties of perjury that:

1. My number shown on this form is my correct taxpayer identification number and that of the minor, and
2. The minor is not subject to backup withholding because he or she (a) is exempt from backup withholding, or (b) has not been notified by the Internal Revenue Service (IRS) that they are subject to backup withholding due to failure to report interest and dividend income, or (c) the IRS has notified them that they are no longer subject to backup withholding, and
3. The minor is a U.S. person (including a U.S. resident alien).

Certification Instructions: You must cross out item 2 above if the IRS has notified the minor that he or she is currently subject to backup withholding because they have failed to report all interest and dividends on their tax return. The IRS does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

## Custodian Signature

By signing this as the custodian of this UTMA investment, I understand that all funds invested and earnings in this investment legally belong to the minor listed on page one, and that the transfers to this investment are irrevocable, which means they cannot be changed.

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Custodian Signature

Date

## Submitting Your Form

To submit your completed form with all required attachments, send a scanned PDF (or similar format) to [investment@genfi.com](mailto:investment@genfi.com) or mail the document(s) to the address at the bottom of page 1.