



Office Use Only	
Check #	
Customer #	

Investment Application

Type of Ownership- select one type of ownership and complete the appropriate lines

- Individual** (line A) **Organization**** (line A) **Trust** (line A)
 Joint* (lines A and B) **Minor with Custodian** (lines A and B)

A. _____
 Owner/Minor Name Social Security Number/EIN Date of Birth Driver's License #/State

B. _____
 Owner/Custodian Name Social Security Number/EIN Date of Birth Driver's License #/State

Contact Information

 Street City State Zip

 Telephone Number Email Address

Check if you are subject to backup withholding.

* Joint owners are considered as joint tenants with rights of survivorship and not as tenants in common. Interest is reported to the Internal Revenue Service using the social security number of the first named person.

** Corporate investors must include the following back-up documentation:
 Corporate Resolution
 Authorized Signature Record

Investment Options

Investment Amount

Demand Investment (\$100 minimum) _____
 Church Savings Investment (\$5000 minimum - available to churches and affiliated ministries) _____
 Term Investments: 6-month (\$100 minimum)..... _____
 1-year (\$100 minimum)..... _____
 2-year (\$100 minimum)..... _____
 3-year (\$100 minimum)..... _____
 4-year (\$100 minimum)..... _____
 5-year (\$100 minimum)..... _____
 Cornerstone Kids* (\$250 min) _____

Make check payable to: Converge Cornerstone Fund

Interest Payment (select one)

- Compound semi-annually
- Payment to owner by check (select one)
 ___ monthly ___ quarterly ___ semi-annually ___ annually
 - 6-month Investment only pays interest monthly or at maturity.
- Electronic transfer to my bank account (select one)
 - Please attach a voided check.
 ___ monthly ___ quarterly ___ semi-annually ___ annually
 - 6-month Investment only pays interest monthly or at maturity.

Investor Certification

I hereby acknowledge receipt of the Offering Circular dated April 1, 2018, of Converge Cornerstone Fund. I represent that I am 18 years of age or older. I further represent that I am a member of, contributor to, or participant in Converge, or a beneficiary or successor in interest to such person. I understand that the certificate(s) I currently hold has been purchased for my own account and that in the event I hold more than one certificate that this statement applies to all such certificates.

Certification - Under the penalties of perjury, I certify that:

- All information provided is accurate and the number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me).
- I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding.

Signature of Principal Certificate Owner or Trustee

Date

I choose to view my statements electronically at myconverge.org

Signature of Joint Owner or Custodian

Date

Certification Instructions - If you have been notified by the IRS that you are currently subject to backup withholding because of underreporting interest or dividends on your tax return, you must cross out item (2) above.

Note: Due to the IRS regulations, the Fund cannot issue your certificate until your taxpayer identification number is provided and the above certification signed. Additionally, in accordance with the US Patriot Act, the Converge Cornerstone Fund is required to verify the identity of any person or entity seeking to open an account. When you open an account, we will ask for your name, address, date of birth and other information that will allow us to identify you. We may also ask for a copy of your driver's license or other identifying documents. We will use this information to confirm the identity reported on an investment application with a third party public records database.

Beneficiary Information

List the person or organization to which you want to transfer the balance of your Certificate upon the death of the last surviving owner.

Beneficiary's Name & Address	Social Security #	Relationship	Share %

Spousal Consent (AZ, CA, ID, NV, NM, TX, WA, and WI residents only)

If you are married, reside in a community property state (listed above) and designate someone other than your spouse as your sole primary beneficiary, your spouse must sign below.

I am the spouse of the Certificate owner stated above. I give the owner any interest I have in the Certificate. Therefore, I agree to my spouse's naming of a primary beneficiary other than myself. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. I also acknowledge that I shall have no claim whatsoever against Converge Cornerstone Fund for any payment to my spouse's named beneficiary(ies).

Signature of Certificate Owner's Spouse

Date

Spouse of

How did you hear about Converge Cornerstone Fund?

Please check as many as may apply:

- I am a current investor
 Bulletin inserts
 Converge Point magazine
 Individual referral
 Website
 Newline
 Presentation in my church
 Other _____