



**Complete the application that matches your intended ownership type:**

**Page 1) Universal – For Individual, Joint Owner or Minor with Custodian Ownership**

- Please note: All minor with custodian certificates are opened under the Illinois Transfer to Minor Act where the age of majority is twenty-one (21)
- **Note: The application is not valid unless signed on the back**

**Page 2) Trust – To open a certificate in the name of your trust**

*Please send the following pages of your trust document with your application*

- a) Title page showing the full, legal name of the trust
- b) Page naming trustees
- c) Page naming successor trustees, if applicable
- d) Page(s) listing the trustee powers
- e) Signature page(s) including notary seal
- If you have a certification of trust, that would fulfill the requirement
- **Note: The application is not valid unless signed on the back**

**Page 3) Church/Organizations - To open a certificate for your church or organization**

- Please be sure to include the full EIN
- *Organizations* must include Articles of Incorporation
- **Note: The application is not valid unless signed on back.**

**When making the initial investment via ACH:**

*Be sure to check the box to make your initial deposit via ACH*

- 1) **Fax:** 773.784.4897
- 2) **Email:** [ncp@nationalcovenantproperties.org](mailto:ncp@nationalcovenantproperties.org)
- 3) **Regular Mail:** National Covenant Properties  
8303 West Higgins Road  
Chicago, IL 60631

**When making the initial investment with a check:**

- 1) **Make your check payable to National Covenant Properties** (we are unable to accept third party checks regardless of the endorsement)
- 2) **Mail the check with your application to:**  
National Covenant Properties  
8303 West Higgins Road  
Chicago, IL 60631

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## UNIVERSAL CERTIFICATE APPLICATION

OFFICE USE ONLY

Cert #: \_\_\_\_\_

Check #: \_\_\_\_\_

**TYPE OF OWNERSHIP** – select one and complete the corresponding lines

- ☐ **Individual** (Line A)      ☐ **Joint\*** (Lines A, B and C)      ☐ **Minor With Custodian\*\*** (Lines A, B and C)

A. \_\_\_\_\_  
Owner/Minor Name      Date of Birth      Social Security Number

B. \_\_\_\_\_  
Joint Owner/Custodian Name      Date of Birth      Social Security Number

C. \_\_\_\_\_  
Joint Owner/Custodian Name      Date of Birth      Social Security Number

**CONTACT INFORMATION**

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Email Address \_\_\_\_\_

☐ Check here if you are subject to backup withholding (see reverse).

\* **Joint Owners:** used for two or more persons when it is desired that any one of them may make redemption or other changes to the investment. Upon the death of one or more joint owner(s), the ownership passes to the living owner(s). List on Line A the person to whom the earnings are reported to the IRS. List the other owner(s) on Line B and Line C.

\*\* **Minor With Custodian:** Opened under the IL Transfer to Minors Act which deems a minor an adult at the age of 21.

**INVESTMENT OPTIONS** – Certificates have a \$500 minimum. Demand Investment Accounts (DIA) have a \$50 minimum.

Interest Rates are as stated in Appendix B of our current Offering Circular.

Investment Amount

- ☐ **Five-Year Fixed Rate Renewable Certificate** \_\_\_\_\_ \$ \_\_\_\_\_
- ☐ **30-Month Fixed Rate Renewable Certificate** \_\_\_\_\_ \$ \_\_\_\_\_
- ☐ **Variable Rate Certificate** \_\_\_\_\_ \$ \_\_\_\_\_
- ☐ **Demand Investment Account (DIA)** \_\_\_\_\_ \$ \_\_\_\_\_

☐ I choose to go paperless (register for online access at [www.nationalcovenantproperties.org](http://www.nationalcovenantproperties.org))

☐ I wish to make my initial deposit via ACH

☐ Use bank information on file    ☐ Use new bank information per attached voided check

**Make check payable to: National Covenant Properties** (we are unable to accept third party checks)

You can add to, or withdraw from your Variable Rate Certificate or DIA with 30 days written notice.

**I/WE WANT TO REISSUE MY/OUR CERTIFICATE(S):**

Use \$ \_\_\_\_\_ from my certificate(s) \_\_\_\_\_ to open the investment(s) indicated above  
and \_\_\_\_\_.

# UNIVERSAL CERTIFICATE APPLICATION

## INTEREST PAYMENT (select one)

- ☐ Add interest to principal\*
- ☐ Monthly electronic transfer to my bank account (we require a voided check for bank information)
- ☐ Semi-annual interest payment (attach a voided check for payment via ACH)

\* Accrued interest can be withdrawn at will by written request.

## CHURCH AFFILIATION

What Covenant church are you member of, or participant in?

Church Name

City

State

Zip

## I/WE WAS/WERE INTRODUCED TO NCP THROUGH: (check all that apply)

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Current Investor | <input type="checkbox"/> COV Magazine Ad   | <input type="checkbox"/> Covenant Event _____ |
| <input type="checkbox"/> Family or friend | <input type="checkbox"/> NCP Facebook Page | <input type="checkbox"/> My Conference _____  |
| <input type="checkbox"/> NCP Employee     | <input type="checkbox"/> NCP Instagram     | <input type="checkbox"/> Other _____          |

## INVESTOR CERTIFICATION

Certification: I hereby acknowledge receipt of the Offering Circular dated **March 1, 2018**, of National Covenant Properties. I represent that I am 18 years of age or older. I further represent that prior to receipt of the Offering Circular, I was a member of, contributor or participant in The Evangelical Covenant Church, or was an ancestor, descendant or successor in interest to such person. I understand that the principal and payment of interest is dependent in large part upon the future generosity of members of churches receiving loans, and that this income stream cannot be predicted with any certainty.

Under the penalties of perjury, I certify that the Social Security Number and the information regarding backup withholding on this form are true, correct and complete.

Signature of Primary Certificate Owner or Custodian

Date

Signature of Joint Owner\*

Date

Signature of Joint Owner\*

Date

\*If ownership is joint, signatures of all owners are required.

## INSTRUCTIONS FOR SUBSTITUTE FORM W-9 PAYER'S REQUEST FOR TAXPAYER IDENTIFICATION NUMBER CERTIFICATION

National Covenant Properties (as well as all other payers of interest or dividends) must withhold 28% of interest or dividends if:

- 1) You fail to provide National Covenant Properties with your Social Security Number, or
- 2) The Internal Revenue Service notifies National Covenant Properties that you furnished an incorrect Social Security Number, or
- 3) You are notified by the Internal Revenue Service that you are subject to backup withholding, or
- 4) You fail to certify by signing this form that you are not subject to backup withholding under (3) above, or fail to certify your Social Security Number.

To prevent backup withholding or interest paid, you must certify that you have provided your correct Social Security Number to National Covenant Properties for all certificates owned by you; and, you must certify that you are not subject to backup withholding.

## PENALTIES

Certain civil and criminal penalties may be imposed if you:  
 Fail to furnish your Social Security Number, or  
 Fail to report properly any portion of an includible payment of interest or dividends on your tax return, or  
 Provide false information with respect to backup withholding, or  
 Falsify certifications or affirmations

## INVESTORS EXEMPT FROM BACKUP WITHHOLDING

Investors specifically exempted from backup withholding on all payments include organizations exempt from tax under Section 501(a) of the Internal Revenue Code as an organization listed in section 501(c)(3) of the Code, such as a member congregation of The Evangelical Covenant Church. However, such investors are still required by National Covenant Properties to complete and sign the application in order to avoid erroneous backup withholding.



## TRUST CERTIFICATE APPLICATION

OFFICE USE ONLY

Cert #: \_\_\_\_\_

Check #: \_\_\_\_\_

**TRUST OWNERSHIP** – Please include a copy of your Trust Certificate, or pages listing trustee name(s), trustee powers, successor trustee designation (if applicable) and signature page(s), including notary seal.

A. \_\_\_\_\_  
Trust Name \_\_\_\_\_ Trust Tax ID \_\_\_\_\_

B. \_\_\_\_\_  
Trustee Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Social Security Number \_\_\_\_\_

C. \_\_\_\_\_  
Trustee Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ Social Security Number \_\_\_\_\_

### **CONTACT INFORMATION**

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ Email Address \_\_\_\_\_

☐ Check here if you are subject to backup withholding (see reverse).

**INVESTMENT OPTIONS** – Certificates have a **\$500 minimum**. Demand Investment Accounts (DIA) have a **\$50 minimum**.

Interest Rates are as stated in Appendix B of our current Offering Circular.

**Investment Amount**

- ☐ **Five-Year Fixed Rate Renewable Certificate** \_\_\_\_\_ \$ \_\_\_\_\_
- ☐ **30-Month Fixed Rate Renewable Certificate** \_\_\_\_\_ \$ \_\_\_\_\_
- ☐ **Variable Rate Certificate** \_\_\_\_\_ \$ \_\_\_\_\_
- ☐ **Demand Investment Account (DIA)** \_\_\_\_\_ \$ \_\_\_\_\_

☐ I choose to go paperless (register for online access at [www.nationalcovenantproperties.org](http://www.nationalcovenantproperties.org))

☐ I wish to make my initial deposit via ACH

☐ Use bank information on file ☐ Use new bank information per attached voided check

**Make check payable to: National Covenant Properties** (we are unable to accept third party checks)

You can add to, or withdraw from your Variable Rate Certificate or DIA with 30 days written notice.

### **I/WE WANT TO REISSUE MY/OUR CERTIFICATE(S):**

Use \$ \_\_\_\_\_ from my certificate(s) \_\_\_\_\_ to open the investment(s) indicated above  
and \_\_\_\_\_.

## TRUST CERTIFICATE APPLICATION

### INTEREST PAYMENT (select one)

- ☐ Add interest to principal\*
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- ☐ Semi-annual interest payment (attach a voided check for payment via ACH)

\* Accrued interest can be withdrawn at will by written request.

### CHURCH AFFILIATION

What Covenant church are you member of, or participant in?

Church Name

City

State

Zip

### I/WE WAS/WERE INTRODUCED TO NCP THROUGH: (check all that apply)

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Current Investor | <input type="checkbox"/> COV Magazine Ad   | <input type="checkbox"/> Covenant Event _____ |
| <input type="checkbox"/> Family or friend | <input type="checkbox"/> NCP Facebook Page | <input type="checkbox"/> My Conference _____  |
| <input type="checkbox"/> NCP Employee     | <input type="checkbox"/> NCP Instagram     | <input type="checkbox"/> Other _____          |

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Under the penalties of perjury, I certify that the Social Security Number and the information regarding backup withholding on this form are true, correct and complete.

Signature of Trustee

Date

Signature of Trustee

Date

Signature of Trustee

Date

### INSTRUCTIONS FOR SUBSTITUTE FORM W-9 PAYER'S REQUEST FOR TAXPAYER IDENTIFICATION NUMBER CERTIFICATION

National Covenant Properties (as well as all other payers of interest or dividends) must withhold 28% of interest or dividends if:

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- 2) The Internal Revenue Service notifies National Covenant Properties that you furnished an incorrect Social Security Number, or
- 3) You are notified by the Internal Revenue Service that you are subject to backup withholding, or
- 4) You fail to certify by signing this form that you are not subject to backup withholding under (3) above, or fail to certify your Social Security Number.

To prevent backup withholding or interest paid, you must certify that you have provided your correct Social Security Number to National Covenant Properties for all certificates owned by you; and, you must certify that you are not subject to backup withholding.

### PENALTIES

Certain civil and criminal penalties may be imposed if you:

- Fail to furnish your Social Security Number, or
- Fail to report properly any portion of an includible payment of interest or dividends on your tax return, or
- Provide false information with respect to backup withholding, or
- Falsify certifications or affirmations

### INVESTORS EXEMPT FROM BACKUP WITHHOLDING

Investors specifically exempted from backup withholding on all payments include organizations exempt from tax under Section 501(a) of the Internal Revenue Code as an organization listed in section 501(c)(3) of the Code, such as a member congregation of The Evangelical Covenant Church. However, such investors are still required by National Covenant Properties to complete and sign the application in order to avoid erroneous backup withholding.



## ORGANIZATION/CHURCH CERTIFICATE APPLICATION

OFFICE USE ONLY

Cert #: \_\_\_\_\_

Check #: \_\_\_\_\_

### **OWNERSHIP BY A CHURCH/ORGANIZATION** – Organizations only: please include a copy of your Articles of Incorporation.

A. \_\_\_\_\_  
Name of Church/Organization EIN

B. \_\_\_\_\_  
Name of Contact Person Title

### **CONTACT INFORMATION**

Street City State Zip

Telephone Email Address

Email Address Email Address

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☐ **Demand Investment Account (DIA)** \$ \_\_\_\_\_

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### CHURCH AFFILIATION – Organizations only

What Covenant church are you member of, or participant in?

Church Name

City

State

Zip

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Signature

Title

Date

Signature

Title

Date

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