



# New Investor Application

Questions? Call 1-866-839-8376

**Instructions:** Complete this application to become a new Investor in the Texas Range. This application must be included with all other required documentation and certifications in order to be accepted and processed by the Texas Range Client Services Group. Submit this form through Connect, or fax or mail this form to the fax number or address at the bottom of the page.

**INVESTOR INFORMATION:** (All fields in this section must contain Investor information only.)

**Investor Name:** \_\_\_\_\_  
(Name to appear on Program records)

**Legal Name:** \_\_\_\_\_  
(Name as filed with the IRS, if different from above)

**Street Address:** \_\_\_\_\_  
Street Address (A P.O. Box is not acceptable)

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_  
Mailing Address (If different from Street Address)

**City** \_\_\_\_\_ **State** \_\_\_\_\_ **Zip** \_\_\_\_\_

**Phone #:** \_\_\_\_\_

**Fax #:** \_\_\_\_\_

**Fiscal Year End:** \_\_\_\_\_  
(Month and Day)

**Entity Type:** \_\_\_\_\_  
(Township, School District, etc.)

**TAX IDENTIFICATION NUMBER (TIN)**

**Note:** If the information required by this section is not provided, the current IRS Backup Withholding Rate of taxable dividends, capital gains and proceeds of redemptions and exchanges will be imposed under federal tax regulations.

**TIN :** \_\_\_\_\_ **Form of Organization:** \_\_\_\_\_  
(Taxpayer Identification Number) (e.g., 501(c)(3) organization, C corporation, limited liability company, etc.)

**Tax Status:** I have not been notified by the IRS that I am currently subject to Backup Withholding.  
I am an exempt recipient.  
I am neither a citizen nor a resident of the United States.

**INVESTOR CERTIFICATION:** (A representative of the Investor should read, complete, sign and date this section.)

- I. The undersigned represents and warrants that he/she has the full power and authority to make investments on behalf of the Investor listed above.
- II. The undersigned certifies that the Investor named on this application adopted or enacted the attached **Ordinance/Resolution** at a duly convened meeting of the governing body of the Investor held on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, and that such Ordinance/Resolution is in full force and effect on the date of this application, and that such Ordinance/Resolution has not been modified, amended or rescinded since its adoption or enactment. (Please attach the Ordinance/Resolution to this document.)
- III. The undersigned further certifies that the Investor has received a copy of the Program's Information Statement, and agrees that the Investor will be bound by the terms of such document.
- IV. The establishment of an account is subject to acceptance by the Program and is subject to the conditions under the provisions contained in the Information Statement.
- V. Under penalty of perjury, the undersigned below certifies that the tax identification number provided for this Investor is true, correct and complete.
- VI. The information, authorizations, and certifications set forth in or attached to this New Investor Application shall remain in full force and effect until the Program receives written notification of change.

\_\_\_\_\_  
Authorized Signature as Designated in the Ordinance/Resolution

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print or Type Name of Authorized Signatory

\_\_\_\_\_  
Title/Position

**REQUIRED DOCUMENTATION:** (Please include the following required documents with this application.)

- Form W-9 (Name on W-9 must match IRS records)
- Ordinance/Resolution
- Investment Policy

**PROGRAM USE ONLY:**

\_\_\_\_\_  
Texas Range Representative Signature

\_\_\_\_\_  
Date

**Any document containing sensitive information received by email will not be accepted. Please send by uploading through Connect, fax, or mail.**

<b>SEND VIA CONNECT:</b>	Log in to Account Access	<b>FAX TO:</b>	Texas Range Client Services Group	<b>MAIL TO:</b>	Texas Range Client Services Group
<i>Existing Connect</i>	Click <input checked="" type="checkbox"/> Secure Contact		1-800-252-9551		P.O. Box 11760
<i>Users Only</i>	Select file to upload - Send message				Harrisburg, PA 17108-1760

PROGRAM USE ONLY	
V2022.04	INITIALS
Processed	
Confirmed	