# **Non-Retirement Account**

NEW ACCOUNT APPLICATION

Check here if amendment.

# Account Registration

Individual / Joint Account  FOR ASSISTANCE with this form, call Shareholder Services at (800) 662-0201, or the Timothy Plan at (800) 846-7526.	NAME (First, Initial, Last)	GENDER: O Male O Female	DATE OF BIRTH	TAXPAYER ID NUMBER or SSN
UNDER AGE 18: Complete and attach the Special Request Form E, Account for Minors Indemnification.	JOINT NAME  ADDRESS		DATE OF BIRTH	TAXPAYER ID NUMBER or SSN
NOT TO BE USED FOR INDIVIDUAL RETIREMENT ACCOUNTS.				
	CITY  DAYTIME PHONE NUMBER	EMAIL (optional)	STATE	ZIP  U.S. CITIZENSHIP STATUS:  O CITIZEN  O RESIDENT ALIEN O NONRESIDENT ALIEN

### **Registration Type**

**WARNING.** This application cannot be processed unless signed below by the Responsible Individual(s).

UNDER AGE 18: A parent or guardian must sign attach a completed Special Request Form E, Account for Minors Indemnification.

The manner in which you register your account can have significant tax and liability implications. We cannot provide tax and estate planning advice, and suggest you consult your tax professional if you are uncertain about which registration is best for you. IF YOU FAIL TO SELECT A REGISTRATION OPTION, YOUR ACCOUNT WILL DEFAULT TO JOINT TENANTS WITH RIGHTS OF SURVIVORSHIP (JTWROS).

Select one from the following:

- O Individual Account: Usually for persons who are not adding a second person to their account.
- O **Tenants in Common:** Usually for two (or more) persons who are not married and who, in the event of their death, desire to leave their ownership interest to their separate heirs, however, the ownership interest is a part of the decedent's estate and in most cases subject to probate.
- (Default) Joint Tenants With Rights of Survivorship (JTWROS): The owners desire that in the event of the death of
  any owner, the decedent's ownership interest will pass the other owners without the necessity of going through a
  probate estate.
- Tenants by the Entireties (TBE): A registration that is reserved exclusively for married couples. It provides for special protection from creditors and for the assets to pass to the surviving spouse in the event one or the other spouse dies. TBE is currently recognized in twenty-five states (and Washington DC), seven of which do not include personal property (investments) as a TBE asset. CHECK WITH YOUR TAX PROFESSIONAL TO DETERMINE IF TBE IS AVAILABLE IN YOUR STATE AND IS BEST FOR YOU.

Gifts/Transfers
To A Minor
(UGMA)

Uniform Gift to Minors (UGMA) accounts are recognized in all 50 states and are typically irrevocable once established. In most states, the beneficiary gains control of the funds when they reach the age of 21, while a few states set this age at 18. A custodian must be named for UGMA accounts, and they are responsible for managing the investments until the beneficiary reaches adulthood. To avoid issues if the custodian becomes incapacitated or passes away, it is strongly recommended to name a backup (contingent) custodian.

MINOR'S NAME (First, Initial, Last)		DATE OF BIRTH	MINOR'S TAX ID or SSN	
ADDRESS		CITY	STATE ZIP  U.S. CITIZENSHIP STATUS:  OCITIZEN	
DAYTIME PHONE NUMBER EMAIL (optional)			O RESIDENT ALIEN O NONRESIDENT ALIEN	
CUSTODIAN'S NAME (First, Initial, Last)		DATE OF BIRTH	CUSTODIAN'S TAX ID or SSN	
ADDRESS		CITY	STATE ZIP  U.S. CITIZENSHIP STATUS:	
DAYTIME PHONE NUMBER	EMAIL (optional)		<ul><li>CITIZEN</li><li>RESIDENT ALIEN</li><li>NONRESIDENT ALIEN</li></ul>	

Transfer on Death (TOD)	children of a beneficiary	you list to inherit that bene	unt in the event of your death, please list ficiary's share (if that beneficiary predect to be distributed to the other beneficial	eases you), check the box <i>Pei</i>
	TOD BENEFICIARY'S NAME (First, Initio	al, Last)	O Pro Rata to the survivors O Per S	tirpes %
			O Pro Rata to the survivors O Per S	tirpes %
	TOD BENEFICIARY'S NAME (First, Initio	al, Last)		
	TOD BENEFICIARY'S NAME (First, Initio	al, Last)	O Pro Rata to the survivors O Per S	tirpes %
Trust or Business Account	NAME OF: OTRUST OPARTNERS	HIP O C. CORPORATION O S. CORPOR	ATION O PARTNERSHIP OLLC/LLP (check one)	ENTITY'S TAX ID
NOTE: Please list all individuals who will have authority to open and/or transact business for this account on behalf of the legal entity in	ADDRESS		СІТУ	STATE ZIP
whose name this account will be registered. Please also enclose documents supporting: (A) existence of legal entity (e.g., a photocopy of the title, signature, and appropriate pages of the	DAYTIME PHONE NUMBER	EMAIL (optional)		DATE OF TRUST (if applicable)
trust document, articles of incorporation, business license, partnership agreement); and (B) authority of each individual authorized to transact business on this account (e.g., corporate	TRUSTEE'S NAME or AUTHORIZED SIG	GNER	DATE OF BIRTH	TRUSTEE'S TAX ID or SSN
resolution, partnership certificate, trustee(s)).  WARNING: If you complete this section without providing the classification, per IRS regulations, we must default to an S Corporation.	ADDRESS (if different than above)  DAYTIME PHONE NUMBER	EMAIL (optional)	СІТУ	STATE ZIP  U.S. CITIZENSHIP STATUS  O CITIZEN  O RESIDENT ALIEN  O NONRESIDENT ALIEN
CORPORATIONS OR OTHER ENTITIES (Include a copy of one of the following documents: registered articles of incorporation, government-issued business license, partnership	CO-TRUSTEE'S NAME or CO-AUTHORI	IZED SIGNER (if applicable)	DATE OF BIRTH	CO-TRUSTEE'S TAX ID or SSN
papers, plan documents or other official docu- mentation that verifies the entity and lists the		., ., .		
authorized individuals. Failure to provide this documentation may result in a delay in processing your application.)	ADDRESS (if different than above)  DAYTIME PHONE NUMBER	EMAIL (optional)	сіту	STATE ZIP  U.S. CITIZENSHIP STATUS  O CITIZEN  O RESIDENT ALIEN
Class A & C Shares	S			
Broker/Dealer  IF APPLICABLE.	BROKER/DEALER NAME		BRANCH NUMBER	
	BRANCH ADDRESS			
	REPRESENTATIVE'S NAME	PRODUCER NUMB	PHONE NUMBER	
Reduced Sales Charge		ase be advised that over the hy Plan family of funds equa	course of the next thirteen months, I intal to or in excess of:	end to purchase a cumula-
Class A & C shares combined.	\$50,000 \$10	00,000 🗆 \$250,000	\$500,000 \$750,000	Over \$1 million
\$\frac{1}{2}\$\$ \$750,000 BREAKPOINT: This selection is only applicable for Fixed Income and High Yield Bond Funds.	share purchases. If the ar	mount indicated is not inves	onth period, you may be entitled to reduc sted within 13 months, regular sales char ed versus the sales charge previously paid ms and conditions.	ge rates will apply to shares
		ON: The following accounts when assessing my reduced s	s, if any, are related and should be includ sales load.	ed in my aggregate pur-
	1.	2.	3.	4.
Net Asset Value (NAV)	_	•	(Both sections must be selected to be practice according to the terms set forth in the fu	,

 $\ensuremath{^{*}}\xspace You may only reinvest distributions in the same class of shares.$ 

Investment Selection	FUND NAME(S)	CLASS	ALLOCATI	ON
If no share class is indicated, a Class A share account will be established.	1.	AC	\$	
	2.	AC	\$	
	3.	AC	\$	
	4.	AC	\$	<u> </u>
	5.	AC	\$	
Dividend & Capital Gains	A. DIVIDENDS: O Reinves	t. O Paid in cash. OD	irect to my Timothy Plan account*:	
Distribution	B. CAPITAL GAINS: O Reinves	t. O Paid in cash. OD	irect to my Timothy Plan account*:	
All dividends and capital gains will be rein- rested in additional shares of the same fund and class if you do not make a selection.	If you choose to have any dividends a make a selection, we will send them t		n, please check one of the options below. If rrent mailing address.	you do not
*You may only reinvest distributions in the same class of shares.	O Send dividends and capital gain	ns to my bank account. (C	omplete Section 5, Bank Information.)	
Class I Chaves				
Class I Shares				
	nstitutions, and to investors working IAR's signature is required for the pu		tment Advisor (RIA) or their Investmer	nt Adviser
	g this application, please call (800) 8			
Registered Investment				
Advisor (RIA)	REGISTERED INVESTMENT ADVISOR FIRM		BRANCH NUMBER	
or	BRANCH ADDRESS			
Investment Adviser Representative (IAR)	REPRESENTATIVE'S NAME	PRODUCER NUMBER	PHONE NUMBER	
F APPLICABLE.		or IAR, and pursuant to the	e purchase of Class I shares. With my s restrictions set forth in the prospectus for	
	SIGNATURE OF REPRESENTATIVE (NAMED ABOVE)		DATE	
nvestment Selection	FUND NAME(S)	CLASS		
f no share class is indicated, a Class A share account will be established.	1.		\$	
1 TO PURCHASE CLASS I SHARES:	2.		\$	
ou must be working with a Registered nvestment Advisor (RIA) or Investment Ad-	3.		\$	
iser Representative (IAR).	4.		\$	
	5.		\$	
Dividend & Control Colle	A DIVIDENDS: OB:	A O Deldin and On	inest to my Timesthy Diese and the	
Dividend & Capital Gains Distribution	A. DIVIDENDS: O Reinves:  B. CAPITAL GAINS: O Reinves:		irect to my Timothy Plan account*: irect to my Timothy Plan account*:	
All dividends and capital gains will be rein-	If you choose to have any dividends a			

 $\bigcirc \textbf{ Send dividends and capital gains to my bank account. } \textit{(Complete Section 6, Bank Information.)}$ 



# 4 Payment Method

Payment Method You can open your account using any of these methods. Please check your choice.  Account Service C	☐ Check (Please make check payable to the Timothy Plan.) ☐ Bank Wire (For instructions, please contact the Transfer Agent toll free at 1-800-662-0201.) ☐ Automatic Investment Plan (Available for Class A shares only. Complete Section 5. An initial \$50 deposit is required.) ☐ Direct Transfer ☐ Other ☐ Other					
Automatic Investment Plan	I AUTHORIZE THE FUND'S AG	GENT TO DRAW CHECKS OR INIT NT* ON THE ATTACHED VOIDED		OUSE (ACH) DEBITS		
NOTE: If you are opening a new fund account and signing up for the Automatic	1. Amount (minimum \$50 per	account, per month or equivalent	): \$			
nvestment Plan, you must include a minimum nitial investment of \$50 with this application.	2. Frequency (choose one):					
A	O Semi-Monthly	O Semi-Annually				
AVAILABLE FOR CLASS A SHARES ONLY.	O Monthly	O Annually				
The bank account designated must have heck or draft writing privileges. Complete ank Information above.	<ul><li>Quarterly</li><li>3. Day in which deposit should begin (or the first business day thereafter, if a holiday or weekend):</li></ul>					
sank information above.	4. Month in which deposit should begin:					
Bank Information	CHECKING OR SAVINGS ACC	OUNT INFORMATION				
The bank account designated must have check or draft writing privileges.	NAME OF BANK		BANK'S PHONE NUMBER	ABA ROUTING NUMBER		
				ACCOUNT TYPE:		
NO CHECKS? If you do not have a check, please contact your savings account provider for wiring instructions, or call (800) 662-0201.	NAME(S) ON BANK ACCOUNT		BANK ACCOUNT NUMBER	○ Checking ○ Savings		
Telephone Transaction Privileges		d above, you may elect the conver ot, if you elect to do so, you may o				
	NO, I DO NOT WANT THE I	FOLLOWING PRIVILEGES:				
	☐ Telephone Purchase.	☐ Telephone Exchange.	☐ Telephone Redemption	n.		
Government/Payroll	☐ Yes, I Want to establish	n a Government/Payroll Direc	t Deposit.			
Direct Deposit	Please indicate if you are establishing an account for this purpose. For additional information regarding the automatic deposit of your government or payroll check, please call us at (800) 662-0201.					





### **Acknowledgment**

### **Your Signature**

**WARNING.** This application cannot be processed unless signed below by the Responsible Individual(s).

**UNDER AGE 18**: A parent or guardian must sign attach a completed Special Request Form E, Account for Minors Indemnification.

I (we) have received and read the current prospectus for the funds I (we) have selected for investment. I (we) agree that any shares purchased now or later will be subject to the terms of the funds' prospectus in effect from time to time. I (we) certify under penalties of perjury: 1) that the Social Security or Taxpayer ID Number provided here is correct and, 2) that unless the circle below is checked, I (we) am (are) not subject to tax withholding because a) I (we) have not been notified by the Internal Revenue Service that I (we) am (are) subject to such withholding because of a failure to report all interest or dividends, or b) the Internal Revenue Service has notified me that I (we) am (are) no longer subject to backup withholding.

#### O I (we) am (are) subject to backup withholding.

I (we) agree that neither the fund nor its agents will be liable for any loss, expense, or cost arising out of any telephone request made pursuant to the features and services selected above, including any fraudulent or unauthorized request and that I, as the account holder, will bear the risk of loss, so long as the fund or its agents reasonably believe that the telephonic instructions are genuine based upon reasonable verification procedures. The verification procedures include recording instructions, requiring certain identifying information before acting upon instructions and sending written confirmations. I (we) certify that I (we) have the power and authority to establish this account and establish the features and services requested and that the authorizations hereon shall continue until the funds receive written notice of a modification signed by all appropriate parties or a termination signed by all parties. All terms shall be binding upon heirs, representatives and assigns.

SIGNATURE OF OWNER	DATE
SIGNATURE OF JOINT OWNER	DATE

 I am exempt from the Foreign Account Tax Compliant Act. The IRS does not require your consent to any provision of this document other than the certification required to avoid backup withholding.

### **Trusted Contact**

In the event you are unable to reach me, or I am unresponsive to your attempts to reach me, my Trusted Contact will be the person mentioned below. I understand you will not share any financial information with this person, and will contact my Trusted Contact only in the event you cannot reach me.

O I (we) understand that this information is voluntary and is not a condition of opening my account.

NAME (First, Initial, Last)  GENDER:   Male   Female PHONE NUMBER EMAIL	ADDRESS		CITY,	STATE	ZIP	RELATIONSHIP	
	NAME (First, Initial, Last)	GENDER: ○ Male ○ Female	PHONE NUI	MBER		EMAIL	

### **USA Patriot Act Notice**

### IMPORTANT INFORMATION

Under the USA Patriot Act, the Board of Trustees of the Trust has approved procedures designed to prevent and detect attempts to launder money. The information you provide us is used exclusively as required under the Patriot Act and to provide the services you have requested.

#### WHAT THIS MEANS FOR YOU:

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 additional identifying documents. The information is required for all owners, co-owners, or anyone who will be signing or completing a transaction on behalf of a legal entity that will own the account. We must return your application if any of this information is missing. If we are unable to verify this information, your account may be closed and you will be subject to all applicable costs. If you have any questions regarding this application, please call (800) 662-0201.

# 8

# **Mailing Your Application**

**Return Completed Form** 

REGULAR DELIVERY:

OVERNIGHT DELIVERY:

Timothy Plan

USE YOUR PREFERRED MAILING METHOD.

Timothy Plan c/o Ultimus Fund Solutions, LLC PO Box 46707, Cincinnati, OH 45246-0707

c/o Ultimus Fund Solutions, LLC 225 Pictoria Dr, Ste 450, Cincinnati, OH 45246

Phone | (800) 662-0201 Local | (402) 493-4603 Fax | (402) 963-9094