

# Joint Investment Trust Investment Transfer



To set up a transfer between your investment accounts, please return this signed form by email, fax or mail to the Christian Church Foundation. Each transfer requires a separate form.

## Timing Guidelines:

- Transfers between accounts **within the same investment fund** can occur at any time.
- Requests for transfers **between different investment funds** require written notice by the 20th of the month will generally be (1) withdrawn effective the first business day of the following month and (2) used to purchase shares of the new fund effective the first business day one month after the withdrawal has taken place.
- Campbell Multi-Strategy Fund transfers in excess of \$500,000 may only be made at each calendar quarter end and require a minimum of 95 days' prior written notice to comply with underlying managers' restrictions.

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## Section 1: Account Information

**From:** Account #: \_\_\_\_\_ Account Name: \_\_\_\_\_  
Fund: Common Beasley Campbell Bostick Brown

**To:** Account #: \_\_\_\_\_ \* Account Name: \_\_\_\_\_  
Fund: Common Beasley Campbell Bostick Brown

*\* If you are transferring into a new account, please attach a completed Deposit Statement. A copy can be found on the Investor Login section of our website, as detailed at the bottom of this form.*

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## Section 2: Transfer Amount

Amount of transfer: \$ \_\_\_\_\_ or Complete transfer

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## Section 3: Date of Transfer

Next available transfer date (following the timing guidelines above)

First business day of \_\_\_\_\_ (choose month, following the guidelines above)

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**Authorized Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

*Please verify that the above signers are included on your current signature card. The required number of signers is according to your policy as documented on your current signature card. To obtain a new signature card, please visit our website as detailed at the bottom of this form.*

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If you have any questions about this form or about your investment with the Christian Church Foundation, call us at 800-668-8016 (ask for Investment Services) or email us at the address below.

**Thank you for your partnership in ministry!**

<b>Mail:</b> Christian Church Foundation P.O. Box 1007 Indianapolis, IN 46206-1007	<b>Fax:</b> (317) 635-1991 <b>Email:</b> investments@ccf.disciples.org
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*For additional forms and information about the Joint Investment Trust, visit the Investor Login section at [www.christianchurchfoundation.org](http://www.christianchurchfoundation.org).  
(Password: disciples)*