CHRISTIAN CHURCH FOUNDATION

Helping Disciples Make a Difference

Permanent Fund Trustees' Checklist

(For those churches invested with the Christian Church Foundation)

- ✓ Become familiar with the information provided on the CCF website, especially the investment materials under the "Investors" tab.

- ✓ Review and, if necessary, update your church's Signature Card that is on file with CCF.

- ✓ Find out who is receiving the quarterly statements for your church and where the reports are filed.

- ✓ Make sure all trustees are given a copy of CCF's Quarterly Executive Summary, available on the website.

- ✓ Find out if someone in your church is receiving the monthly CCF fund performance e-mail. If not, e-mail investment services at investments@ccf.disciples.org to have a designated person's e-mail added to the mailing list.

- ✓ For congregational meetings, prepare a report of your church's investments (annually, at a minimum).

- ✓ Determine when the last planned-giving seminar was held. If it has been more than two years, contact your CCF zone representative to schedule one. Please refer to this CCF Zone Map or call the office at 800-668-8016 if you need contact information for your zone representative.

- ✓ Review your church's permanent fund and other gift policies. Your CCF zone representative can provide recommendations and guidance if your church does not have policies in place.

- ✓ Review any marketing material that your church has about its permanent funds and ensure that the information is current. Your CCF zone representative is a good resource for these materials, so please ask for recommendations or for suggestions if needed.