

Joint Investment Trust

Investment Transfer Request



Complete this form to transfer between your investment accounts. Each transfer requires a separate form. Once completed and signed, please return this form by email, fax, or mail as directed at the bottom of this 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. Transfers will be processed in two steps: (1) the transfer amount will be withdrawn the 1st business day of the following month and (2) the transfer amount will purchase into the new investment fund the 1st business day, one month after the withdrawal has taken place.
- Campbell Multi-Strategy Fund transfers in excess of \$500,000 may, at our discretion, be restricted to the next calendar quarter end, and require a minimum of 95 days' prior written notice to comply with underlying manager restrictions.

Section 1: Account Information

From: Account #: _____ Account Name: _____
Fund: Common Beasley Campbell Bostick Brown

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

* To transfer into a new account, please include a completed [Deposit Statement](#) with this form. The Deposit Statement is located in the 'For Investors' section of our website.

Section 2: Transfer Amount

Amount of transfer: \$ _____ or Complete transfer

Authorized Signature: _____ **Date:** _____

Authorized Signature: _____ **Date:** _____

Please verify that the above authorized signers match those on your current signature card. The required number of signers is determined by your ministry's policy as documented on your current signature card. If your authorized signers or required number of signers has changed, please complete and submit a [Signature Card](#) located in the 'For Investors' section of our website.

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!

Email:
investments@ccf.disciples.org

Fax:
(317) 635-1991

Mail:
Christian Church Foundation
P.O. Box 1007
Indianapolis, IN 46206-1007

For additional forms and information, please visit the 'For Investors' section of our website www.christianchurchfoundation.org.