

Joint Investment Trust Online Access Request



Complete this form to request online access for your investment account(s). Once completed, please return this form by email, fax, or mail as directed at the bottom of this form.

Information Available Includes:

Withdrawal requests, transfers, or account changes cannot be processed through online access.

- **Transactions** are available for review one business day after being processed.
- **Market values** are generally available by the 8th business day of the following month. Historical market values are also available by changing the as of date in holdings.
- **Information** available includes transactions, market values, and optional quarterly statements.

Ministry Name: _____ **City:** _____ **State:** _____

Section 1: Primary Contact

Each ministry will receive one username and password to be shared among users. No transactions or account changes can be made through online access. The contact provided below should be a financial officer or another person who oversees the ministry's investment accounts. If online statements are chosen, the contact below will receive an email notification when a new statement is available.

Contact Name: _____

Contact Email: _____

Section 2: Statement Election

Quarterly statements are distributed by mail. Once online access is established, your ministry can elect to receive statements through online access, instead of by mail.

Continue receiving statements by mail.

Receive instructions to enroll in statements through online access.

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.