



ECF CUSTOM ACCOUNT INFORMATION

Simply click on the shaded area, enter the information, save and e-mail, mail or fax (see page3).

Name of Account

Mailing Address

Mailing Address

Phone Number

Fax Number

e-mail address

Federal Tax ID #

CONTACT INFORMATION

Primary Contact

Secondary Contact

Name

Title

Phone Number

Email Address

Address

City, State Zip

Name

Title

Phone Number

Email Address

Address

City, State Zip

Please note that the primary contact listed above will be listed in our files as the person with authority to change asset allocations or withdraw funds on behalf of the institution.

Also note that monthly statements of the account will be sent by surface mail to the two contacts listed above at the address given unless we receive different instructions. Statements will also be sent by e-mail to a distributions list that you provide. Please attach the names and e-mail addresses of those you want to receive the monthly statement and quarterly performance reports.

INVESTMENT SELECTION

Estimated amount of initial investment \$

Portfolios for custom accounts will be shaped by our investment advisors to reflect the investment objectives described in your Investment Policy Statement.

Note:

- (a) Future contributions will be invested to match the initial target allocations or subsequent modifications.
- (b) All withdrawals of funds occur only upon written notification (by mail or e-mail) and are paid out as soon as assets can be sold and funds made available.
- (c) Accounts will be rebalanced automatically to the asset allocation on record when funds are added, withdrawn, or change from the target asset allocation by more than 3% (reviewed at least quarterly).

DISTRIBUTIONS

Please make distributions from our ECF account as follows (place an in the box):

- Reinvest all income in proportions set above
- Distribute all income
- Distribute fixed \$
- Monthly Quarterly Semi-annually Annually

Distribution can be made via direct deposit (Automated Clearing House). Check here to receive a direct deposit authorization form.

PLANNED GIVING CONTACT

Each EMS Account is entitled to receive a free copy of *Planned Giving on Demand*, a comprehensive package of printed planned giving materials and access to an on-line website featuring a step-by-step, five stage planned giving program with hyperlinks to the resources mentioned. The site also includes our latest planned giving materials with regular updates.

Person to receive copy:

Name

Title

Phone Number

Email Address

Address

City State Zip

EPISCOPAL CHURCH FOUNDATION CONTACT INFORMATION

Please send this completed form and all written notifications to:

Director of Endowment Services
Episcopal Church Foundation
815 Second Avenue, New York, NY 10017

By e-mail: ken@episcopalfoundation.org

By fax: (717) 796-1603

Phone: (800) 697-2858x 6241 or (717) 796-1852

How did you hear about the ECF IMS Services?

Advertisement

Foundation field staff

Diocese

Conference

Other, please specify:

Today's date

Person completing form (please print)