

SOUTHERN VIRGINIA DIOCESAN FOUNDATION

ADDITIONAL INVESTMENTS FORM

or

WITHDRAWAL FORM

or

CHANGE DISTRIBUTION FORM

Participant (Parish, Mission, Foundation) _____

Address _____

City _____, Virginia _____

The Participant listed above wishes to take the following action:

_____ To **deposit** with the Foundation the sum of \$ _____ as an addition to the existing _____ Fund (name of Fund) already held with the Trustees of the Southern Virginia Diocesan Foundation. [The check should be made payable to "Bank of America".]¹

_____ To **transfer** the sum of \$ _____ from the _____ Fund (name of Fund) already held with the Trustees of the Southern Virginia Diocesan Foundation to the _____ Fund (name of Fund) already held with the Trustees of the Southern Virginia Diocesan Foundation.¹

_____ To **withdraw** from the Foundation the sum of \$ _____ from the _____ Fund (name of Fund) on deposit with the Trustees of the Southern Virginia Diocesan Foundation.²

_____ To **request a change in the quarterly distributions** in the _____ Fund, by electing to commence receiving quarterly distributions or by electing to cease receiving quarterly distributions. [Please specify which election: _____ commence receiving *or* _____ cease receiving quarterly distributions.]³

Participant's Authorized Representative_

Date

¹ Additional investments and transfers may be made any time.

² Withdrawals will be disbursed after the end of a quarter if a request is received by the Diocesan Treasurer after the 15th day of the last month of that quarter.

³ A request to change the quarterly distribution election will be effective the quarter received if such request is received by the Diocesan Treasurer on or before the 15th day of the last month of that quarter.