ANGLICAN JOINT INVESTMENTS
REQUEST FOR ADDITION\WITHDRAWAL\CHANGE

INVESTMENT OF FUNDS

IS THIS: A NEW INVESTMENT
AN ADDITION TO AN EXISTING INVESTMENT

Name of Parish\Congregation: _____

Name of Investment: _____

Investment Number(if an addition): _____

Amount: _____

Source of Funds:
- ☐ Special Bequest
- ☐ Fundraising
- ☐ Other

If a Special Bequest, are there any restrictions on how the funds are to be used.

_____
_____
_____

Distribution of Dividends: Pay to Investment Holder
Reinvest

WITHDRAWAL OF FUNDS (Please include copy of Resolution)

Name of Parish\Congregation: _____

Name of Investment: _____

Investment Number: _____

Withdrawal Amount: _____

CHANGE IN INVESTMENT INFORMATION (Please include copy of Resolution)

Dividend Distribution: From _____

To _____

Name of Investment: Present Name: _____

New Name: _____

Signed on Behalf of the Parish\Congregation: Rector _____

Warden _____

Date: _____ Warden _____

Diocesan Officer _____