



the
EPISCOPAL
CHURCH in
WESTERN OREGON

THE EPISCOPAL CHURCH IN WESTERN OREGON
INVESTMENT FUNDS ACCOUNT TRANSFER INSTRUCTIONS

Date: _____

Account Holder Name on Fund: _____ Account Number: _____

Total Transfer Amount: _____

We would like to make the following transfer within our investment funds for the above stated amount.

Transfer From:

Long-Term Investment **DIF (xxx4332)**
Short-Term Investment **STIF (xxx4761)**
Socially Responsible Fund **SRIF (xxx4340)**

Transfer To:

Long-Term Investment **DIF (xxx4332)**
Short-Term Investment **STIF (xxx4761)**
Socially Responsible Fund **SRIF (xxx4340)**

We understand and acknowledge that these funds will be transferred in accordance with our instructions upon receipt by Fifth Third. We also represent that this request for transfer has been reviewed and approved by the appropriate authority within our church and the person(s) signing below have the approved authority to execute this transfer.

I hereby acknowledge and represent that I am authorized to sign this form and direct the transfers requested above.

Account Owner/Representative

Signature

Print Name

Title

Please send complete form to Charitable Managed Custody (CMSSupport@53.com) and Mike Penfield (mike.penfield@gmail.com).

Mailing Address: P.O. Box 22310, Milwaukie, OR 97269
Milwaukie: 2780 SE Harrison St., Suite 202, Milwaukie, OR 97222
Coos Bay: 420 Highland Ave, Coos Bay, OR 97420
www.ecwo.org | 503.636.5613