

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 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 _____
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 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.