
ACCOUNT INFORMATION

Account Name

Account Number

INTERNET ACCESS

A login ID and temporary password was assigned to you when your account was opened. If you will not be accessing the account online, please indicate that below and we will discontinue your online access.

- Yes, I will be accessing my account online.
- No, I will not be using online access to the account.

EMAIL STATEMENTS

You have the option to have your quarterly account statement sent via email. Please indicate your preference below:

- YES! Please send my statement to the following email address:

- No, Please send me a hard copy account statement on a quarterly basis.

FINANCIAL ADVISOR AUTHORIZATION

You can authorize your financial advisor to initiate certain account transactions on your behalf through the online account interface. These transactions include submission of grant requests and updating personal account information. Please indicate your preference below:

- Yes, I authorize my financial advisor to update my account information and submit grant requests on my behalf
- No, I DO NOT authorize my financial advisor to initiate requests on my behalf

SIGNATURES

Donor / Donor Advisor Signature

Name (please print)

Date (MM/DD/YY)

Donor / Donor Advisor Signature

Name (please print)

Date (MM/DD/YY)