CHRISTIAN CHURCH FOUNDATION

Helping Disciples Make a Difference

Permanent Fund Trustees' Checklist

For those invested with the Christian Church Foundation

- ✓ Become familiar with the Christian Church Foundation (CCF) website for marketing and other information. Visit www.christianchurchfoundation.org. Under *churches and organizations*, choose the investor services login, enter the user name: *investor*, password: *disciples*.
  - o Fillable forms available on the website include:
    - Signature Card
    - Direct Deposit Authorization
    - Scheduled Distribution Request Form
    - One-time Withdrawal Request Form
    - Additional Deposit Form
  - o Past quarterly Executive Summary reports that detail:
    - Performance history
    - Asset allocations
- ✓ Review and, if necessary, update the fund's signature card that is on file with CCF.
- ✓ Find out who is receiving the quarterly statements and where they are filed.
- ✓ Make sure all trustees are given a copy of CCF's quarterly Executive Summary.
- ✓ See if someone in the church is receiving the monthly e-mail updates on the CCF funds' performance. If not, contact Investment Services to have a designated person's e-mail added.
- ✓ Prepare a report of the church's investments for congregational meetings, at a minimum annually.
- ✓ Determine when the last inheritance planning seminar was held; if more than two years ago, contact your CCF representative to schedule one.
- ✓ Review the church's permanent fund and other gift policies.
- ✓ Review any marketing material the church has about its permanent funds.

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