

IRA INVESTMENT CHANGE

The term IRA will be used below to mean Traditional IRA and Roth IRA, unless otherwise specified.
If this is an inherited IRA, the Investment Owner is the beneficiary who has inherited this IRA.



PO Box 19700, Irvine, CA 92623-9700
Fax: 866.303.9360

I. INVESTMENT OWNER

Name (First/Mi/Last)

Social Security Number

Date of Birth

Phone

Email Address

Customer Number

II. TRUSTEE OR CUSTODIAN

Church Development Fund, Inc.

Name

17701 Cowan, Suite 100

Address

Irvine, CA 92614

City/State/ZIP

(888) 540-7112

Phone

ACCOUNT TYPE (Select one)

- Traditional IRA Inherited Traditional IRA Roth IRA Inherited Roth IRA

III. INVESTMENT CHANGE INFORMATION

The current investment identified below will be liquidated immediately unless otherwise specified in the Special Instructions section.

CURRENT INVESTMENT INFORMATION

Investment Description	Quantity or Amount to Move	Investment Number	Maturity Date	Earnings in Current Year	Loss of Earning Penalty	Close Investment
_____	_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	_____	_____	_____	<input type="checkbox"/>

SPECIAL INSTRUCTIONS

NEW INVESTMENT INFORMATION

Investment Description	Quantity or Amount to Invest	Investment Number	Term/Maturity Date	Interest Rate
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

IV. SIGNATURE

I certify that all of the information provided by me is accurate and may be relied upon by the trustee or custodian. I authorize the change of investment described above.

Signature of IRA Owner

Date (mm/dd/yyyy)

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