

Joint Investment Fund of the Trustees of the Diocese of Ohio



New JIF Account Information

Parish or Organization Name _____

Parish Address _____

City, State, ZIP _____

Name of New Fund _____

Amount _____

Which fund is your organization investing in? (Choose one):

Balanced Fund

☐

Money Market Fund

☐

What does your organization want to do with income earned from the fund? (Choose one):

☐

Distribute the income as a check

☐

Direct deposit the income (VOIDED deposit slip attached)

☐

Reinvesting the income from the fund (describe this fund below):

If your organization chose to distribute the income in cash, please select an option below.

☐

Distribute income as a check

☐

Direct deposit the income (VOIDED deposit slip attached)

How do you want the monthly statement delivered to your parish or organization? (Choose one):

☐

E-mail to: _____

☐

Mail to the parish or organization

☐

Both mail and e-mail

How will you be funding the new account? Choose one:

☐

Check made payable to: The Trustees of the Diocese of Ohio

☐

ACH to Trustee Account

☐

Transfer from an existing fund below:

Joint Investment Fund of the Trustees of the Diocese of Ohio

New JIF Account Information (cont.)

Note: All funds should be received at the offices of the Diocese of Ohio no later than 2 business days prior to the end of the month. Funds will begin to receive an income distribution in the month following their addition to your account.

Are there any restrictions on the withdrawal or use of the funds?

- ☐ Yes, the funds are permanently restricted. No withdrawals can be made from the principal of the fund.
- ☐ No, the funds are unrestricted and can be withdrawn and used for any purpose.
- ☐ Yes, the funds can be withdrawn and used only for a specific purpose (state below):
-

Who is authorized to withdraw funds from the account? Please list all names and titles below:

Signature

Print Name

Signature

Print Name

Signature

Print Name

Note: All withdrawal requests must be in writing and received in the diocese offices no later than 2 business days prior to the end of the month. Funds will be distributed no later than the 15th of the following month. Withdrawals will be made in the same form (check or direct deposit) as elected for the income distribution. If a different payment method is desired for the withdrawal, please so indicate on the withdrawal request.

**Completed forms will be accepted by email at finance@dohio.org
or mail at **2230 Euclid Avenue, Cleveland 44115, Attn: Finance****