



TO: Churches in the Diocese of Western New York

FROM: The Episcopal Church Foundation Team

RE: Diocesan Investment Trust

In late October of 2018 the Trustees transferred funds in the DIT of Western New York from HSBC Bank to the Endowment Management Solutions Program of the Episcopal Church Foundation which uses State Street Global Advisors in Boston, MA as their investment manager.

The December 2018 statements were sent by regular mail to your church’s address. In the future your quarterly statements will be distributed by email to the name or names you submit on this form. You can complete this form online and return it to ECF by email.

Detail on the new procedures including forms to withdraw money, add to your account, or open a new account can be found in other sections of this website.

Distribution List for: Name of Church and Account(s).

PLEASE PRINT IF RETURNING BY REGULAR MAIL.

Person(s) to receive quarterly statements. Include additional names on second page as needed.

(name) (email address)

(name) (email address)

(name) (email address)

Please return this form by mail to Josh Anderson, Episcopal Church Foundation, 475 Riverside Drive, Suite 750, New York, NY 10115 or by email to endowment@episcopalchurchfoundation.org.

Person completing form: _____
(name) (title)

Questions? Call Josh Anderson or Brad Roberts at (800) 697-2858.