

***Diocese of Western New York
Diocesan Investment Trust***

Opening a New Account

To open a new account for your church/organization, please complete the following form and return it to the Episcopal Church Foundation in New York. ECF will reply informing you of the new account number which you can use on the Additions to Account Form. Requests should be submitted to endowment@ecf.org.

PLEASE PRINT

Church/Organization Name _____

Address _____

Phone Number _____ Email Address _____

Person Completing Form

Name _____

Title _____

Name of New Account

Type of Fund

___ True Endowment Fund ___ Quasi Endowment Fund ___ Investment Fund

___ Reserve Fund

There are four investment options in the Diocese of Western New York DIT. Fund A- Growth & Income Fund; Fund B- Income Fund; Fund D- Growth Fund; Fund E- Socially Responsible Fund. Most churches choose to invest in the Growth & Income Fund, a mix of equities and fixed income assets.

Churches can invest one fund in more than one strategy, for example 50% in the Growth Fund and 50% in the Income Fund. For tracking purposes, please open a separate account for each strategy. If you are selecting more than one strategy, please name each account according to the strategy (i.e. Endowment Growth Fund and a second one called the Endowment Income Fund.)

Questions? Contact the Episcopal Church Foundation at (800) 697-2858