

The following information will assist in establishing your account with the Presbyterian Foundation. We will send the organization an agreement that will explain the terms of the account.

### 1. ORGANIZATION INFORMATION

Organization Name \_\_\_\_\_ Federal Tax ID \_\_\_\_\_

Address \_\_\_\_\_  
Address City, State Zip Code

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Web Address \_\_\_\_\_ Email \_\_\_\_\_  
(For general organizational correspondence,  
including quarterly account statements)

#### Our Organization is:

- Presbyterian
- Presbyterian-related (Please provide documentation)

### 2. BANK INFORMATION

For account to which income distributions will be deposited. Please include a voided check for account verification.

- Voided check included

Routing Number \_\_\_\_\_

Account Number \_\_\_\_\_

### 3. ACCOUNT CONTACT

Please assign responsibility to the appropriate individuals for the account management activities listed below.

- Access Account information
- Make withdrawal requests
- Request administrative changes to funds
- Will receive quarterly statements (online)

Contact Name (please print) \_\_\_\_\_ Position \_\_\_\_\_

Email (required) \_\_\_\_\_ Phone \_\_\_\_\_

Contact Name (please print) \_\_\_\_\_ Position \_\_\_\_\_

Email (required) \_\_\_\_\_ Phone \_\_\_\_\_

#### 4. AUTHORIZATION

*I certify that each of the people listed above is authorized to access the account.*

Authorized Signer Name (please print) \_\_\_\_\_ Position \_\_\_\_\_

Email (required) \_\_\_\_\_ Phone \_\_\_\_\_

Grant the authorized signer access to the account?     Yes     No

Authorized Signature \_\_\_\_\_ Date \_\_\_\_\_

Submit your completed application, a voided check, and documentation of Presbyterian relatedness to the Presbyterian Foundation.

**Note:** Account Contact(s) and Authorized signer will receive an email with information regarding online account access upon the establishment of your account.



200 E 12th Street, Jeffersonville, IN 47130  
800-858-6127 Fax: 502-805-0466 [presbyterianfoundation.org](http://presbyterianfoundation.org)  
For questions, email: [anita.clemons@presbyterianfoundation.org](mailto:anita.clemons@presbyterianfoundation.org)