

**The Episcopal Diocese of Atlanta  
Diocesan Investment Fund**

New Account Form

To open a new account for your parish or ministry in accordance with the Participation Agreement, please complete the following form and return it to the Diocese of Atlanta at *FinanceAdmin@episcopalatlanta.org* along with a fully executed resolution of the Vestry or meeting minutes of the governing body. Please call Barbara Schroeder, Canon for Administration and Finance of the Diocese of Atlanta, at 404-601-5350 with any questions. ECF will send you your new account number. When you are ready to transfer funds into the new account, please use the *Addition to Account Form* and include the new account number on that form.

Participant Information

Name \_\_\_\_\_

Title \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Name of New Account

\_\_\_\_\_

Person Completing Form

Name \_\_\_\_\_

Title \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Additional Information

\_\_\_ New participant, execute and send to the Diocese:

- \_\_\_ Participant Agreement
- \_\_\_ Participant Resolution
- \_\_\_ Addition to Account Form
- \_\_\_ Withdrawal from Account Form

\_\_\_ New account for existing participant, execute and send to the Diocese:

- \_\_\_ Addition to Account Form
- \_\_\_ Withdrawal from Account Form

Distribution List (for statements and reports)

Name \_\_\_\_\_ Email \_\_\_\_\_

Name \_\_\_\_\_ Email \_\_\_\_\_

Name \_\_\_\_\_ Email \_\_\_\_\_

Name \_\_\_\_\_ Email \_\_\_\_\_