



## BOND/EQUITY BUY AND SELL FORM

This form is required when buying or selling units of the Colorado Episcopal Foundation Bond or Equity Fund. To change the allocation or income option of your account, fill out a new initial investment designation form.

**For new accounts**, an Initial Investment Designation Form and an Account Resolution Form must be submitted with the initial buy. The minimum opening balance for a new account is \$2,000.

Church/ Account Name: \_\_\_\_\_  
Fund Number (six digits): \_\_\_\_\_

Investment Account Number (three digits) \_\_\_\_\_

**TO BUY UNITS IN EITHER FUND:**

Equity Fund \$ _____	OR	Invest total dollars based on specified	
Bond Fund \$ _____		percentages on file with the Foundation	
Total \$ _____		Total \$ _____	

(Check is enclosed or use funds in Limited Maturity Income Fund Account # \_\_\_\_\_)

**TO SELL UNITS IN EITHER FUND:**

Equity Fund \$ _____	OR	Sell total dollars based on specified	
Bond Fund \$ _____		percentages on file with the Foundation	
Total \$ _____		Total \$ _____	

(If you wish to liquidate both funds in their entirety, check here )

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

\_\_\_\_\_  
Printed Name \_\_\_\_\_  
Phone Number

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

\_\_\_\_\_  
Printed Name \_\_\_\_\_  
Phone Number

***THIS FORM MUST BE RECEIVED BY THE FOUNDATION BEFORE 12:00 NOON  
OF THE LAST BUSINESS DAY OF THE CALENDAR QUARTER IN ORDER FOR THE  
INSTRUCTIONS CONTAINED HEREIN TO BE HONORED.***