

**CATHOLIC INVESTMENT TRUST  
ACCOUNT UPDATE FORM**



Diocese of Toledo Account Name: \_\_\_\_\_  
Account Number: \_\_\_\_\_

**CONTACT UPDATE:**  Add  Remove

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone No.: \_\_\_\_\_ Fax No: \_\_\_\_\_  
Email: \_\_\_\_\_  
Establish New KeyLink Access? Yes  only select yes if you don't currently have access)

**INVESTMENT ELECTION UPDATE:**

	Existing Allocation	New Allocation
Investment in Money Market Fund	_____ %	_____ %
Investment in Fixed Income Pool	_____ %	_____ %
Investment in Balanced Pool	_____ %	_____ %
Investment in Long Term Pool	_____ %	_____ %
Investment in Aggressive Growth Pool	_____ %	_____ %
<b>TOTAL (must equal 100%)</b>	_____ %	_____ %

**INCOME DISTRIBUTION ELECTION UPDATE (*Automatic Distributions*)**

Options:  Monthly  Quarterly  Annually  Reinvest all income  
 Method of Distribution:  
 Issue Check to Parish/Entity Name: \_\_\_\_\_  
 Direct Distribution to checking or savings account – please complete below:  
 Financial Institution: \_\_\_\_\_  
 Account Name: \_\_\_\_\_  
 Account No: \_\_\_\_\_  
 If other than KeyBank ABA (Routing) No: \_\_\_\_\_

**\*\*PLEASE NOTE THAT ACH IS THE PREFERRED/ MORE SECURE METHOD OF DISTRIBUTION**

**AUTHORIZED ACCOUNT SIGNER MUST COMPLETE BELOW**

Authorized Signature: \_\_\_\_\_  
 Printed Name and Title: \_\_\_\_\_ Date: \_\_\_\_\_  
 Return this form to: [catholic\\_diocese@keybank.com](mailto:catholic_diocese@keybank.com) OR  
 KeyBank  
 Attn: Randy Englund  
 300 Madison Ave, Suite 1500  
 Toledo, OH 43604

**\*\* All e-mails must be Cc'd to your Pastor or equivalent AND Rene Schmidbauer @ [rschmidbauer@toledodiocese.org](mailto:rschmidbauer@toledodiocese.org)**  
 \*\*\*\* FORMS RECEIVED AFTER THE 25<sup>TH</sup> ARE PROCESSED THE FOLLOWING MONTH \*\*\*\*  
 \*\*\*QUESTIONS RELATED TO FILLING OUT THE FORM CALL RANDY ENGLUND 419-259-8218