



## Permanent Fund Trustees' Checklist

For those invested with the Christian Church Foundation

- ✓ Review and, if necessary, update the fund's signature card that is on file with Christian Church Foundation.
- ✓ Find out who is receiving the quarterly statements and where they are filed.
- ✓ Make sure all the trustees are given a copy of the Foundation's Quarterly Executive Summary.
- ✓ See if someone in the church is receiving the monthly e-mail updates on the CCF funds' performance. If not, contact CCF to have a designated person's e-mail added to the list.
- ✓ Prepare a report of the church's investments for the congregation's annual meeting, at a minimum.
- ✓ Determine when the last inheritance planning seminar was held; if more than two years, contact your Foundation representative to schedule one.
- ✓ Review the church's permanent fund and other gift policies.
- ✓ Review any marketing material the church has about its permanent funds.
- ✓ Become familiar with the CCF website for marketing and other information. [www.disciples.org/ccf](http://www.disciples.org/ccf).
  - Forms available on the website for downloading:
    - Signature card
    - Direct deposit request form
    - Request for scheduled withdrawal form