

Columbia Union Revolving Fund Authorized Representative Summary Form



Complete this form to update your authorized representatives for your organization. Each representative listed on this form must also send in an Authorized Representative Confidential Information Form. Please include a copy of the board minutes showing the vote that confirms with the names and positions of the authorized representatives listed below. Use a second form if space is needed for additional representatives. Please send this form to CURF (email preferred) and attach a copy of the minutes from the board voting these authorizations (except for Local Conferences).

CHURCH/ORGANIZATION INFORMATION					
LEGAL NAME:			EIN:		CURF PIN <small>(CURF USE ONLY):</small>
PHYSICAL ADDRESS:			CITY:	STATE:	ZIP CODE:
MAILING ADDRESS <small>(IF DIFFERENT):</small>			CITY:	STATE:	ZIP CODE:
CHURCH PHONE:	LOCAL CONFERENCE:		WEBSITE <small>(optional):</small>		
NAME OF PASTOR:		PASTOR'S PHONE:	NAME OF CHURCH CLERK:		CLERK'S PHONE:
PASTOR'S EMAIL <small>(optional):</small>			CLERK'S EMAIL <small>(optional):</small>		
AUTHORIZED REPRESENTATIVES					
Authorized representatives with <u>full signing authority</u> may make changes to the entity's mailing address, make redemption requests, and in general may discuss confidential information with CURF representatives regarding the organization's loan(s) and/or investment(s). Authorized representatives can also be granted limited authority, such as read-only access when viewing and downloading the organization's statements through the portal, or only be granted privileges to specific loans or investments (e.g.: only loans or only specific investment numbers).					
NAME OF TREASURER:			DEGREE OF ACCESS: <input checked="" type="checkbox"/> FULL		
NAME OF ADDITIONAL REPRESENTATIVE:		TITLE:	DEGREE OF ACCESS: <input type="checkbox"/> FULL OR <input type="checkbox"/> LIMITED: complete following section		
LIMITED AUTHORITY OPTIONS	<input type="checkbox"/> ALL LOANS	(List loan and/or investment numbers here, if not all)	REDEMPTION REQUESTS		ACCESS TO ONLINE PORTAL
	<input type="checkbox"/> ALL INVESTMENTS		<input type="checkbox"/> MAY MAKE REQUESTS	<input type="checkbox"/> NONE <input type="checkbox"/> VIEW ONLY	
	<input type="checkbox"/> ONLY THE FOLLOWING:		<input type="checkbox"/> CANNOT MAKE REQUESTS	<input type="checkbox"/> VIEW AND UPDATE	
NAME OF ADDITIONAL REPRESENTATIVE:			DEGREE OF ACCESS: <input type="checkbox"/> FULL OR <input type="checkbox"/> LIMITED: complete following section		
LIMITED AUTHORITY OPTIONS		(List loan and/or investment numbers here, if not all)	REDEMPTION REQUESTS		ACCESS TO ONLINE PORTAL
	<input type="checkbox"/> ALL LOANS		<input type="checkbox"/> MAY MAKE REQUESTS	<input type="checkbox"/> NONE <input type="checkbox"/> VIEW ONLY	
	<input type="checkbox"/> ALL INVESTMENTS		<input type="checkbox"/> CANNOT MAKE REQUESTS	<input type="checkbox"/> VIEW AND UPDATE	
	<input type="checkbox"/> ONLY THE FOLLOWING:				
VERIFICATION					
A corporate officer of the church/organization, such as a Pastor, Church Clerk, Principal, Board Chair, etc., must verify that the above representatives are authorized by the board with the powers enumerated above. The corporate officer may not be one of the named authorized representatives.					
NAME OF CORPORATE OFFICER:			TITLE:		
SIGNATURE:			DATE SIGNED:		

Making Ministry Possible

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