

# INVESTMENT OWNERSHIP CHANGE



Texas District Church Extension Fund  
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## STEP 1: Current Ownership

Investment Number \_\_\_\_\_

This account is currently: (choose one, please print)

Sole Owner: \_\_\_\_\_  
Owner Name

Joint Tenants with Right of Survivorship: \_\_\_\_\_  
Joint Owner 1 Name

\_\_\_\_\_ Joint Owner 2 Name Joint Owner 3 Name

Custodial: \_\_\_\_\_  
Minor Name

\_\_\_\_\_ Name of Custodian under TXUTMA

Trust: \_\_\_\_\_  
Trust Name

Organization: \_\_\_\_\_  
Organization Name

## STEP 2: New Ownership

Please change the ownership to: (choose one, please print)

Sole Owner: \_\_\_\_\_  
Owner Name

Joint Tenants with Right of Survivorship: \_\_\_\_\_  
Joint Owner 1 Name

\_\_\_\_\_ Joint Owner 2 Name Joint Owner 3 Name

Custodial: \_\_\_\_\_  
Minor Name

\_\_\_\_\_ Name of Custodian under TXUTMA

Trust: \_\_\_\_\_  
Trust Name

Organization: \_\_\_\_\_  
Organization Name

### STEP 3: Authorization

The current owner(s) / trustee(s) / officer(s) / custodian must **all sign** below, authorizing the change in ownership (listed in Step 1).

\_\_\_\_\_  
Name Signature Date

\_\_\_\_\_  
Name Signature Date

\_\_\_\_\_  
Name Signature Date

The new owner(s) / trustee(s) / officer(s) / custodian must **all sign** below, authorizing the change in ownership (listed in Step 2).

\_\_\_\_\_  
Name Signature Date

\_\_\_\_\_  
Name Signature Date

\_\_\_\_\_  
Name Signature Date

#### Additional Forms

If you are changing ownership to:

- a trust, please submit a Trust Certification to Act form
- individual owner(s), please submit Personal Information Form(s)

#### Directions

- Please return the **original** note certificate.  
 **I / We do not have the original note certificate for this account.**
- See the Offering Circular for more information about types of ownership.

#### Definitions

- **Individual Investment:** The investor owns the account. On the death of the investor ownership of the account passes as a part of the investor's estate under the investor's will or by intestacy.
- **Joint Tenants with Right of Survivorship Investment:** The investors own the account in proportion to their net contributions. Texas CEF may pay any sum in the account to any owner at any time. On the death of an investor, the investor's ownership of the account passes to the surviving investor(s).
- **Trust, Business, etc.:** The investment is owned by the trust, business, etc. Texas CEF may pay any sum in the account as directed by any authorized trustee/officer. The Texas CEF Trust Certification must be attached.
- **Custodial Account:** The minor (or other individual for whom the custodial relationship is established) owns the investment. Interest is reported to the IRS using the tax identification of the minor. Texas CEF may pay any sum in the account on the order of the custodian(s) only. The investment does not automatically transfer to the minor when they reach majority. The custodian must request a change in ownership to transfer control of the account.

Through investments from Texas District LCMS congregations and their members, Church Extension Fund will be the preferred financial resources partner for district ministries focused on multiplying followers of Jesus.